

BUDGET ADJUSTMENT TEMPLATE INSTRUCTIONS

Updated: June 3, 2018





“NEW” BUDGET ADJUSTMENT TEMPLATE

BUDGET ADJUSTMENT TEMPLATE

You may only key data into the yellow coloured cells (**Required)

***Uwin ID** Enter your UWin ID for tracking purposes

***Adjust Type** Select the type of transfer (On-going or One-time)

Use the grid below to enter the following information:

- Maximum of 100 lines per budget adjustment
- Account information (Fund, Department, Program, Project, Natural Account & Classification)
- Accounting period (i.e. specify a specific month when the adjustment should take place or amortize across the entire fiscal year)
- "Send Funds To" will increase an expense budget (or decrease a revenue budget)
- "Take Funds From" will decrease an expense budget (or increase a revenue budget)
- Add a detailed comment to describe your budget adjustment (max 200 characters)

** WHEN COMPLETE, SAVE AND EMAIL YOUR BUDGET ADJUSTMENT TO budgetadjustments@uwindsor.ca

Version 2.1

Last Updated 2018-05-22

Today's Date 2018-05-29 Today's date

Budget Scenario Adj Budget Adjusted Budget Scenario

Budget Version Active Active Version

Fiscal Year FY17 2017/18 2017/18 Fiscal Year

In balance Your budget adjustment must balance to be loaded

Line #	*FUND	*DEPARTMENT	*PROGRAM	*PROJECT	*NATURAL ACCOUNT	*CLASSIFICATION	*MONTH	*SEND FUNDS TO (Increase Budget)	*TAKE FUNDS FROM (Decrease Budget)	Add a Comment
Lookup	Fund	Department	Program	Project	Natural Account	Classification	use drop down	\$	\$	
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Budget Adjustment

Header section

Grid section



MAKING A BUDGET ADJUSTMENT

① Access the new **Budget Adjustment Template**.

You can find the Budget Adjustment Template online in two spots:

1. On the Uwinsite forms web page: <http://www.uwindsor.ca/finance/glossary-policies-procedures-forms>
2. Or on the Budgets office web page: <http://www.uwindsor.ca/finance/budgets>

② Enter information in the header section:

- UWin ID
- Adjustment Type (One-time or On Going)

*Uwin ID

Enter your UWin ID for tracking purposes

*Adjust Type

Select the type of transfer (On-going or One-time)

③ Complete the grid section of your budget adjustment:

- Account Information (Fund, Dept, Prog, Proj, Acct, Class)
- Accounting Period (month or average across the year)
- Amounts:
 - Send Funds To – Increase an expense budget (Decrease a revenue budget)
 - Take Funds From – Decrease an expense budget (Increase a revenue budget)





MAKING A BUDGET ADJUSTMENT (CONTINUED)

4 Ensure your budget adjustment is “In Balance”.


In balance			
*SEND FUNDS TO (Increase Budget)	*TAKE FUNDS FROM (Decrease Budget)		
\$ 1,000	\$ 1,000		
\$ 1,000			
	\$ 1,000		

Out of balance			
*SEND FUNDS TO (Increase Budget)	*TAKE FUNDS FROM (Decrease Budget)		
\$ 1,000	\$ 900		
\$ 1,000			
	\$ 900		

5 Save your Budget Adjustment Template.





6 E-mail the saved file to budgetadjustments@uwindsor.ca

7 The Budgets Office will load your budget adjustments to UWinsite Budgets and it will interface to UWinsite Finance GL the following day.



BUDGETADJUSTMENTS
Presence unknown

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