



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Request Budget
Change

DATE DEVELOPED: 08/03/21

REVISED DATE:

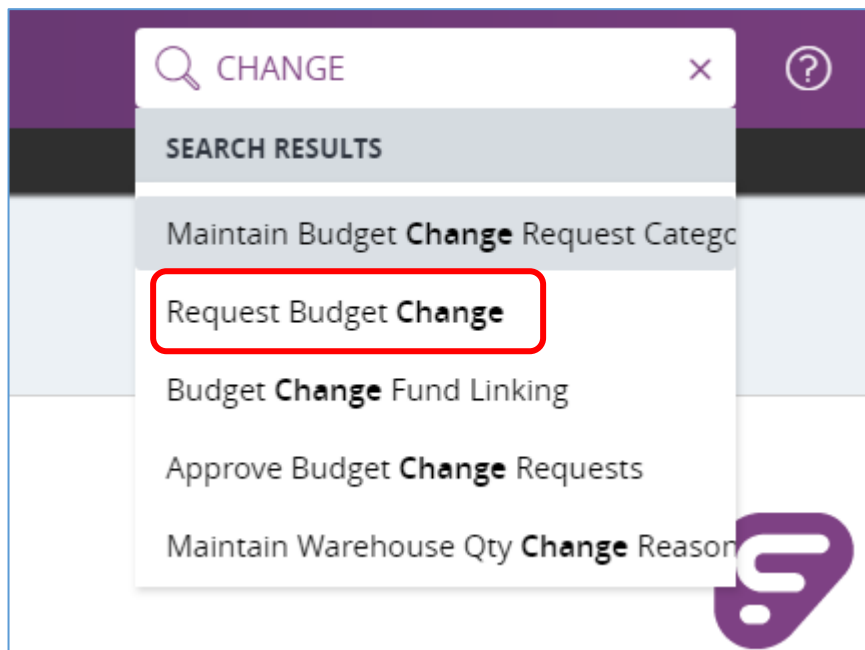
SUBJECT: Request Budget Change

BUDGET CHANGE REQUEST INSTRUCTIONS

(previously Budget Amendment)

Use the Request Budget Change function to submit a request to move funds from one General Ledger account to another. The accounts to which you have access are associated with your position. Requests you submit may be approved or denied either through the Budget Change Request workflow or automatically based on district-defined rules governing budget transfers.

In the search box in the upper right hand side of your screen type in the word "CHANGE". Select "Request Budget Change" or choose it from your Dashboard menu.





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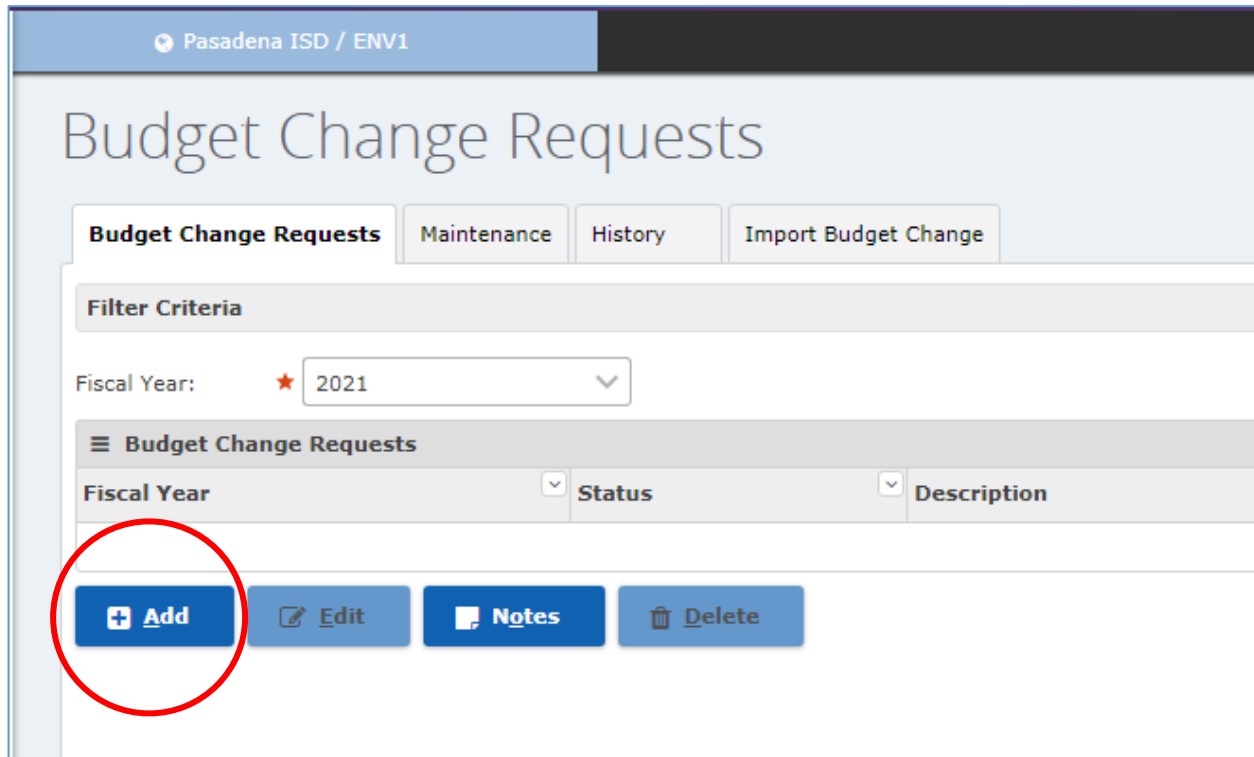
DATE DEVELOPED: 08/03/21

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Click "ADD" to start a new Budget Change Request (BCR)

For these instructions only we are using year 2021. You will use the appropriate school year





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The date will self populate.

Add a short description in the "Description" box.

If you are moving funds between Functions please add the description "**REALLOCATE TO PROPER FUNCTIONS**"

Enter the reason for the change request in the "Justification" box 

Pasadena ISD / ENV1


Maintain Budget Change Request


Fiscal Year: 2021


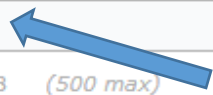
Budget Change Requests **Maintenance** History Import Budget Change

Budget Change Request Details


Request ID: 15

Date: ★ 08-03-2021 

Description: ★ REALLOCATE BUDGET 


Justification: ★  ADMIN TRAVEL 
 Characters remaining: 488 (500 max)

Decrease Accounts

Account	Balance	Amount	Percentage
		\$0.00	0.0000%

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage
		\$0.00	0.0000%

Auto Complete: on



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Click on the plus sign under **Decrease Accounts**. The account string will appear as boxes to be filled in with the account you want to Decrease.

Decrease Accounts

Account + Balance Amount Percentage

\$0.00 0.0000%

Auto Complete: on

Pasadena ISD / ENV1

Maintain Budget Change Request

Fiscal Year: 2021

Budget Change Requests **Maintenance** History Import Budget Change

Budget Change Request Details

Request ID: 16

Date: ★ 08-03-2021

Description: ★ REALLOCATE BUDGET

★ ADMIN TRAVEL

Justification: ★ Characters remaining: 488 (500 max)

Decrease Accounts

Account	Balance Amount	Percentage																		
<table border="1"> <thead> <tr> <th>Fund</th> <th>Func</th> <th>Obj</th> <th>SubObj</th> <th>Org</th> <th>PIC</th> <th>Local</th> <th>Year</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0.00	100.0000%
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner												
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>												
	Amount	Percentage																		
	<input type="text"/>	<input type="text"/>																		
		\$0.00 100.0000%																		

Auto Complete: on

Increase Accounts

Account Balance Amount Percentage

+ **\$0.00 0.0000%**

Auto Complete: on



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ENTRY POINT:
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SUBJECT: Request Budget Change

Once you fill in the account code to Decrease, it will show your current balance in that account.

Decrease Accounts

Account									Balance	Amount	Percentage
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	\$20,000.00	Amount	Percentage
199	23	6399	000	001	99	000000	2021	001			100.0000%
									\$0.00		100.00000%

Auto Complete: on

The wording above the boxes will turn green when entering your account.

Account

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner
199	23	6399						

If at any time you put incorrect information or the account code is not set up the wording above the boxes will turn red. Please reach out to the Budget Dept. if you need an account setup.

Account

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner
199	23	6325						

Fill in the dollar amount you want to Decrease in whole dollars only, then hit tab. Once you do this the amount will show up above the box and in **RED** next to the percentage amount. If you want to take from multiple accounts click the **+** icon to add another line.

Decrease Accounts

Account									Balance	Amount	Percentage
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	\$20,000.00	\$1,000.00	Percentage
199	23	6399	000	001	99	000000	2021	001		Amount	100.0000%
										1000.00	
									\$1,000.00		100.00000%

Auto Complete: on



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SUBJECT: Request Budget Change

Click on the plus sign under Increase Accounts. The account string will appear as boxes to be filled in with the account you want to Increase.

Increase Accounts

Account	Balance	Amount	Percentage
+			\$0.00 0.0000%

Auto Complete: on

Decrease Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner 199 23 6399 000 001 99 000000 2021 001	\$20,000.00	\$1,000.00	Percentage
		Amount	Percentage
		1000.00	100.0000%
+			\$1,000.00 100.0000%

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner [] [] [] [] [] [] [] [] []	\$0.00	Amount	Percentage
			100.0000%
+			\$0.00 100.0000%

Auto Complete: on

Once you fill in your account code to Increase, it will show your current balance in that account.

Increase Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner 199 23 6411 000 001 99 000000 2021 001	\$20,000.00	Amount	Percentage
			100.0000%
+			\$0.00 100.0000%

Auto Complete: on



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The wording above the boxes will turn green when entering your account.

Account								
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner
199	23	6411						

If at any time you put incorrect information or the account code is not set up the wording above the boxes will turn red. Please reach out to the Budget Dept. if you need an account setup.

Account								
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner
199	23	6413						

Fill in the dollar amount you want to Increase in whole dollars only, then hit tab. Once you do this the amount will show up above the box and in RED next to the percentage amount. If you want to move to multiple accounts click the **+** icon to add another line.

Decrease Accounts

Account									Balance	Amount	Percentage	
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	\$20,000.00	\$1,000.00	Percentage	
199	23	6399	000	001	99	000000	2021	001		Amount	100.0000%	
										1000.00		
												\$1,000.00 100.0000%

+ Auto Complete: on

Increase Accounts

Account									Balance	Amount	Percentage	
Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	\$20,000.00	\$1,000.00	Percentage	
199	23	6411	000	001	99	000000	2021	001		Amount	100.0000%	
										1000.00		
												\$1,000.00 100.0000%



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SUBJECT: Request Budget Change

After reviewing the information you have entered, click “Submit” if it is ready to be processed.

Once you click “Submit” you cannot make any changes.

If you are not ready to submit for approval then click “Save”. You will then be able to edit before submitting it for approval.

Pasadena ISD / ENV1

Maintain Budget Change Request

Fiscal Year: 2021

Budget Change Requests Maintenance History Import Budget Change

Budget Change Request Details

Request ID: 17

Date: 08-03-2021

Description: REALLOCATE BUDGET

Justification: ADMIN TRAVEL

Characters remaining: 488 (500 max)

Decrease Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner	\$20,000.00	\$1,000.00	Percentage
199 23 6399 000 001 99 000000 2021 001		Amount	100.0000%
		1000.00	

\$1,000.00 100.0000%

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner	\$20,000.00	\$1,000.00	Percentage
199 23 6411 000 001 99 000000 2021 001		Amount	100.0000%
		1000.00	

\$1,000.00 100.0000%

Auto Complete: on

Attachments

Deleted Attachments

Approve & Return Deny & Return Save **Submit** Cancel



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ENTRY POINT:
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SUBJECT: Request Budget Change

Once you click “Save” it will take you to the main screen where it lists your pending Budget Change Requests.

Budget Change Requests

Budget Change Request saved successfully.

Budget Change Requests Maintenance History Import Budget Change

Filter Criteria

Fiscal Year: 2021

Fiscal Year	Status	Description	Created On	Document ID	Next Approver
2021		REALLOCATE BUDGET	08-03-2021	17	

Add Edit Notes Delete

If you need to make changes locate your Budget Change Request on the main screen. Click on it and it will highlight in yellow. Once it is highlighted in yellow click on “Edit” to open.

Budget Change Requests

Budget Change Requests Maintenance History Import Budget Change

Filter Criteria

Fiscal Year: 2021

Fiscal Year	Status	Description	Created On	Document ID
2021		REALLOCATE BUDGET	08-03-2021	17

Add Edit Notes Delete



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ENTRY POINT:
Request Budget
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DATE DEVELOPED: 08/03/21

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SUBJECT: Request Budget Change

Once you open your Budget Change Request you can edit the Description, Notes, Account codes or Dollar amount.

Maintain Budget Change Request

Fiscal Year: 2021

Request Description: REALLOCATE BUDGET

Budget Change Requests

Maintenance

History

Import Budget Change

Budget Change Request Details

Request ID: 17

Date: ★ 08-03-2021

Description: ★ REALLOCATE BUDGET

Justification: ★ ADMIN TRAVEL

Characters remaining: 488 (500 max)

Decrease Accounts

Account	Balance	Amount	Percentage	
199.23.6399.000.001.99.000000.2021.001	\$20,000.00	\$1,000.00	100.0000%	
		\$1,000.00	100.0000%	

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage	
199.23.6411.000.001.99.000000.2021.001	\$20,000.00	\$1,000.00	100.0000%	
		\$1,000.00	100.0000%	

Auto Complete: on



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REVISED DATE:

SUBJECT: Request Budget Change

If you need to change the account code information click on the account string and the boxes will appear.

Decrease Accounts			
Account	Balance	Amount	Percentage
199.23.6399.000.001.99.000000,2021.001	\$20,000.00	\$1,000.00	100.0000%
<input data-bbox="240 745 272 787" type="button" value="+"/>		\$1,000.00	100.0000%

Auto Complete: on

Make your changes making sure to fill in the dollar amount again as whole dollars.

Decrease Accounts									
Account	Balance	Amount	Percentage						
Fund Func Obj SubObj Org PIC Local Year Owner	\$20,000.00	Amount	Percentage						
<input type="text" value="199"/> <input type="text" value="23"/> <input type="text" value="6499"/> <input type="text" value="000"/> <input type="text" value="001"/> <input type="text" value="99"/> <input type="text" value="000000"/> <input type="text" value="2021"/> <input type="text" value="001"/>		<input type="text"/>	<input type="text" value="100.0000"/>						

Auto Complete: on



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Pasadena ISD

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SUBJECT: Request Budget Change

Once you are done editing and have reviewed it for errors click on "Submit".

Once you click "Submit" you cannot make any changes.

Fiscal Year: 2021 Request Description: REALLOCATE BUDGET

Budget Change Requests Maintenance History Import Budget Change

Budget Change Request Details

Request ID: 17

Date: 08-03-2021

Description: REALLOCATE BUDGET
ADMIN TRAVEL

Justification: Characters remaining: 488 (500 max)

Decrease Accounts

Account	Balance	Amount	Percentage
Fund Func Obj SubObj Org PIC Local Year Owner	\$20,000.00	\$1,000.00	Percentage
199 23 6499 000 001 99 000000 2021 001		Amount	100.0000%
		1000.00	
			\$1,000.00 100.0000%

Auto Complete: on

Increase Accounts

Account	Balance	Amount	Percentage
199 23 6411 000 001 99 000000 2021 001	\$20,000.00	\$1,000.00	100.0000%

Auto Complete: on

Attachments

Deleted Attachments

Approve & Return Deny & Return Save Cancel

Submit



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Once you click “Submit” it takes you back to the main screen and will give you a message that it was saved successfully and that the Approval is in Progress

Budget Change Requests

Budget Change Request saved successfully.
Budget Change Request submitted. Rule Applied: 'To Fund 1XX Requires Approval'. Current status is: 'Approval In Progress'.

Budget Change Requests | Maintenance | History | Import Budget Change

Filter Criteria

Fiscal Year: 2021

Fiscal Year	Status	Description	Created On	Document ID
2021	Approval In Progress	REALLOCATE BUDGET	08-03-2021	17

Add Edit Notes Delete

Note: If you have previously entered a budget change request and its status is “Approval in Progress”, it is displayed on the tab. To search for a previous budget change request that has already been approved or denied, use the History tab.



FRONTLINE PROCEDURES

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How to Delete a Budget Change Request

If you need to delete your BCR locate it on the main screen. Click on it and it will highlight in yellow. Once it is highlighted in yellow click on “Delete”.

The screenshot shows the 'Budget Change Requests' interface. At the top, there is a yellow notification bar that says 'Budget Change Request saved successfully.' Below this, there are tabs for 'Budget Change Requests', 'Maintenance', 'History', and 'Import Budget Change'. Under the 'Budget Change Requests' tab, there is a 'Filter Criteria' section with a 'Fiscal Year' dropdown set to '2021'. Below the filter, there is a table with columns for 'Fiscal Year', 'Status', and 'Description'. The first row in the table is highlighted in yellow and contains the values '2021', an empty status field, and 'REALLOCATE TO PROPER FUNCTIONS'. Below the table, there are four buttons: 'Add', 'Edit', 'Notes', and 'Delete'. The 'Delete' button is circled in red.

Fiscal Year	Status	Description
2021		REALLOCATE TO PROPER FUNCTIONS



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How to view previously submitted budget change request

Click the History tab to bring it forward.

The screenshot shows the 'Budget Change Requests' interface. At the top, there are four tabs: 'Budget Change Requests', 'Maintenance', 'History', and 'Import Budget Change'. The 'History' tab is highlighted with a red circle. Below the tabs is a 'Filter Criteria' section with a 'Fiscal Year' dropdown menu set to '2021'. Underneath is a table header for 'Budget Change Requests' with columns for 'Fiscal Year', 'Status', and 'Description'. At the bottom, there are four buttons: 'Add', 'Edit', 'Notes', and 'Delete'.

You can filter your search by Fiscal Year, Status, Date or Trans #

The screenshot shows the 'Budget Change Request History' interface. At the top, there are four tabs: 'Budget Change Requests', 'Maintenance', 'History', and 'Import Budget Change'. The 'History' tab is selected. Below the tabs is a search filter section with the following fields: 'Fiscal Year' (dropdown menu set to '2021'), 'Status' (dropdown menu), 'Min Date' (text input with a calendar icon), 'Max Date' (text input with a calendar icon), and 'Budget Trans #' (text input). At the bottom, there are two buttons: 'Search' and 'Clear'.



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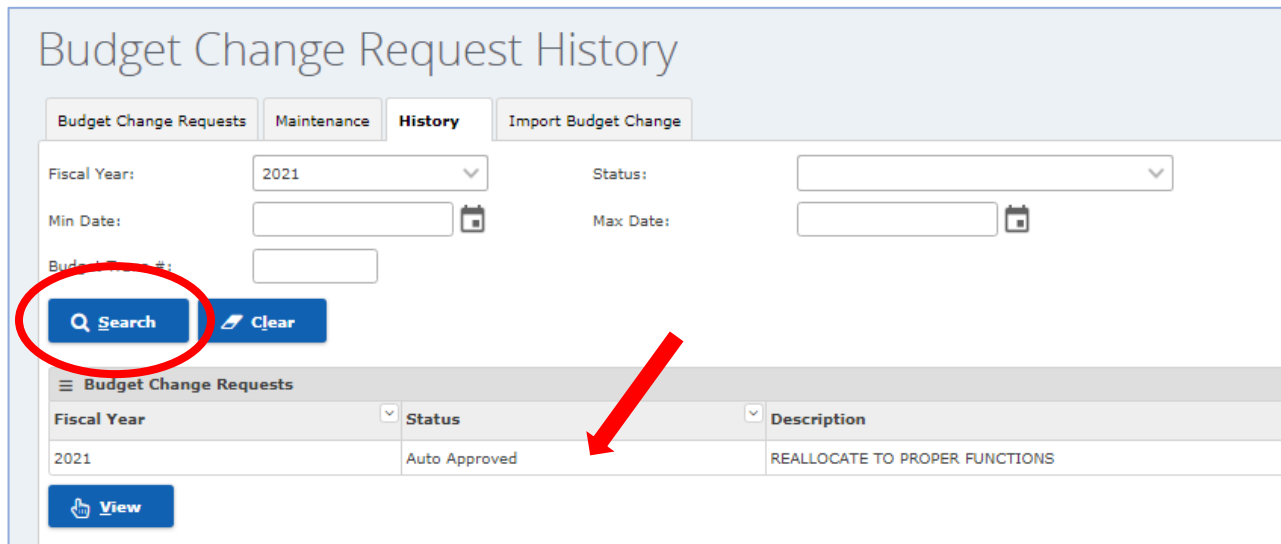
ENTRY POINT:
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Once you enter your search criteria click on the “Search” button. Your BCR’s will appear at the bottom.



Budget Change Request History

Budget Change Requests Maintenance **History** Import Budget Change

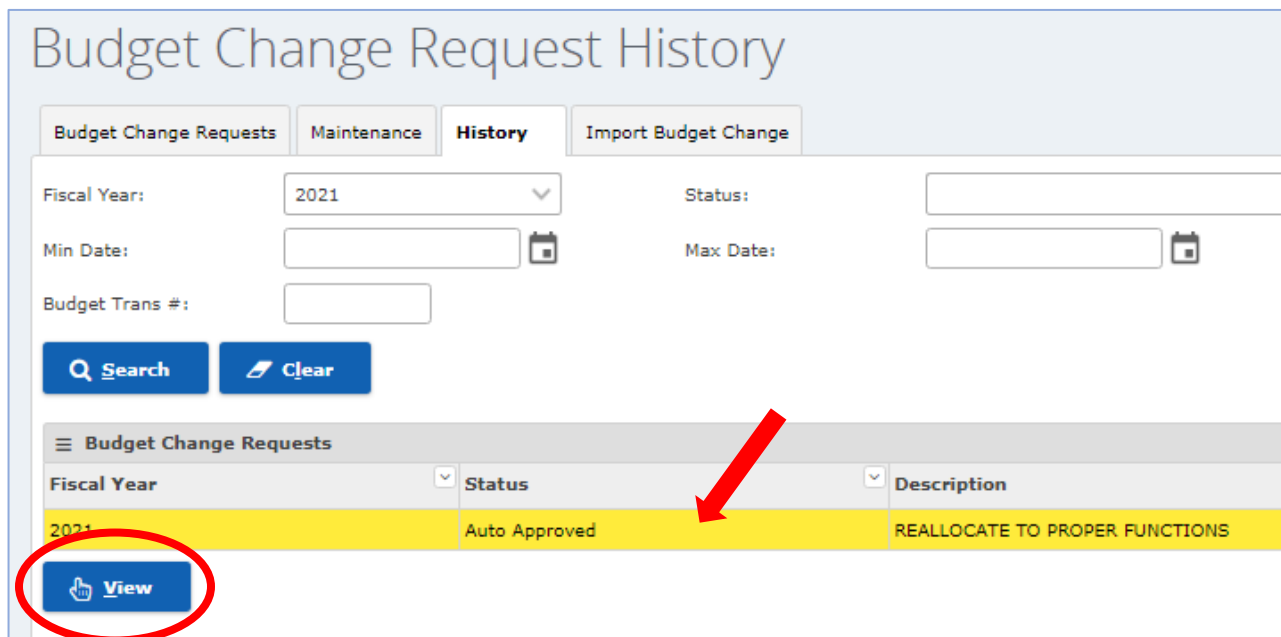
Fiscal Year: 2021 Status:
Min Date: Max Date:
Budget Trans #:
Search Clear

Budget Change Requests

Fiscal Year	Status	Description
2021	Auto Approved	REALLOCATE TO PROPER FUNCTIONS

View

Click on the BCR you want to view and it will highlight in yellow. Once highlighted click on “View”



Budget Change Request History

Budget Change Requests Maintenance **History** Import Budget Change

Fiscal Year: 2021 Status:
Min Date: Max Date:
Budget Trans #:
Search Clear

Budget Change Requests

Fiscal Year	Status	Description
2021	Auto Approved	REALLOCATE TO PROPER FUNCTIONS

View



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Budget Approvals

- Fund 199 - Same Function and PIC
 - This will not come to the budget office
 - Once BCR is approved it will post

- Fund 199 - Between Function and PIC
 - This will come to the budget office
 - Once reviewed and approved it will post

- Fund 461
 - The budget office will set up budgets in account 6399 using the corresponding student activity group
 - Example: 461-23-6399-000-001-00-00PRIN
 - You will then be able to move these around as needed with only your Principals approval

- Grant Funds
 - BCR for grant funds will still flow the same as before