Edwardsville Campus End User Instructions
FORM – Budget Allocation/Adjustment

Use: To request a change/transfer in budget authority after the original budget is posted to AIS.

Access: Access the form via the AIS web site, Electronic Forms, Edwardsville campus location. FormFlow Filler software must be installed on your computer to allow you to access the form. If you do not have FormFlow Filler software, download it from the AIS web page (select Software Downloads, FormFlow Filler).

Instructions: Complete the form using the following instructions: (Unless noted, all fields are REQUIRED.)

Header Information Section: Provide basic information regarding the budget allocation/adjustment.

Fiscal Year Indicate the fiscal year for which this adjustment is effective.

Applicable Fiscal Year
• If the adjustment is temporary, for the current fiscal year only, check Current box.
• If the adjustment should be permanent and applied to the projected fiscal year and beyond, check Projected box.
• If the adjustment should be applied both in the current fiscal year and the projected fiscal years, check both the Current and Projected boxes. If dollar amounts differ between these periods, a second form is required.

Checkmark If Transfer is P/S to OTS, or Vice Versa
If funds are being transferred between personal services and OTS (other than salary) lines, check here. If checked, a Position Allocation Request (PAR) must accompany the Budget Allocation/Adjustment form.

Accounting Flexfield Information Section: Provide the accounting flexfield distribution for each increase and decrease to the budget.

Budget Purpose Title/Description Required; provide the title of the Budget Purpose associated with this allocation/adjustment.
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Budget Purpose Number
Required; list the Budget Purpose.

Object Number
Required; note the Object code value associated with the Budget Purpose. (Refer to on-line Object Codes.)

Department Activity 1
If applicable, list the Department Activity 1 code. (Department Activity codes are 5-digit unique numbers assigned for specific use as defined by the using department. These codes are used at the discretion of the fiscal officer and department.)

Department Activity 2
If applicable, list the Department Activity 2 code. (See above note.)

Period
Optional; if adjustment/allocation should be entered in a future period, indicate what period here. (AIS defaults to month as the period.)

Current/ Projected Year Amount - Decrease/ Increase
Required; in the appropriate column, list the amount of the allocation/ adjustment. (AIS defaults to month as the period.)

Below all items

Total(s)
Sum all decrease/increase entries.

Justification
Provide reason for requesting adjustment

Approval Information Section: Obtain necessary approvals prior to submitting this form.

Fiscal Officer (Requesting/Receiving); “Approved By”
Name/signature of fiscal officer requesting the adjustment and of area to receive the funds.

Date
Date approved.

Fiscal Officer (Transferring Funds)
Name/signature of fiscal officer transferring the funds.

Date
Date approved.

Dean/ Director (if required)
Name/signature of dean/director of area to receive the funds.

Date
Date approved.
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Budget Director (if required)
Name/signature of budget director.

Date  Date approved.

Responsibility Area (if required)
Name of appropriate Responsibility Area.

Date  Date approved.

Decision Center Officer
Name/signature of the appropriate Decision Center Officer.

Date  Date approved.

Chancellor (if required)
Name/signature of the Chancellor.

Date  Date approved.

President (if required)
Name/signature of the President.

Date  Date approved.

Research and Project Fiscal Management Use Only:

Grant or Contract Period
Leave blank.

Budget Period  Leave blank.

Prepared By  Leave blank.

Special Note: Only the fiscal officer may submit this form. In the case of a transfer between units, both fiscal officers must approve this form. The Budget Office will secure any other required approvals.

Routing: Print this form, acquire all appropriate signatures, and mail it to: Budget Office, Box 1034.