



**Activity:** **Budget Amendment**  
**Munis > Departmental Functions > Budget Transfer and Amendments**

Header Page:

1. Click **Add**
2. Tab to Short Description and type **Transfer**
3. Click **Accept**

Budget Amendment Detail Lines:

1. Enter Account Code
  - a. Type in the whole Account Code or
  - b. Type a portion of the code, click on the (...) Ellipsis to display a list of accounts. Click on the account needed, Click **Accept** and the coding fills in automatically.
2. Tab to the comment field
  - a. Enter a meaningful description up to 30 characters
3. Tab through the date
  - a. The date may be changed if needed and you have proper security
4. Type an **I** or **D** in this field
  - a. **I** will increase the funds in the account
  - b. **D** will decrease the funds in the account
5. Type the Amount needed to increase or decrease the account
6. Tab to the next line
  - a. The previous coding will default in as a time saving measure. Change the segment(s) needed or remove completely and type in a new code
7. Repeat steps **1** through **6** to continue adding additional lines
8. When finished, click **Accept**
9. Verify the **debits and credits** agree in the bottom, left corner
10. Click **Return** to go back to the header page

Header Page:

1. Attach any supporting backup through the Attach icon, if needed
2. When finished, click **Release** and the approval status changes to Pending Approval
3. If unfinished, the Budget Amendment remains in the Held status and can be resumed at a later date
  - a. When resuming, click **Browse**, choose an option to see a list of all unprocessed Budget Amendments, click **Accept**. Click on the desired Budget Amendment and click **Accept**.
  - b. Click **Lines**, then **Update**. Tab to the next available line and continue entering information until finished. Verify the debits and credits agree, then click **Accept**.
  - c. Once you have completed, click **Return**
  - d. Click **Release**



Once released into Workflow, the Budget Amendment goes through the Approval process. When the approval process is complete, it must be **Posted** to the General Ledger. This occurs at the District Office twice a day.

Project 01000 and 01020 Posting:

1. Navigate to the header page and click **Approve**
2. Click **Accept** on the comment entry screen
3. Click **Output-Post** on the Munis ribbon
4. At the **Options menu**, select **The current journal only** and click **Accept** on the Munis ribbon.
5. At the **Output** screen, select **Save** and click **OK**
6. At the system message No errors detected, Post Journal click **YES**
7. At the system message Journal(s) updated click **OK**
8. When posting is complete, the Budget Amendment is no longer available on this screen



To find a budget amendment prior to posting, go to the Budget Transfers and Amendments screen, click **Browse**, My Own Journals, **Accept**, click on Journal needed, click **Accept**.



To find a budget amendment after posting, go to Journal Inquiry/Print, click **Search** and enter the journal number, source code or the userid in created by field and click **Accept**. Click **Browse** to see a list or scroll from one to the next at the bottom of the record.



If a budget amendment has been started and will not be completed, remember to delete or cancel it so that funds are not tied up unnecessarily.



When the cursor has gone past a desired field, **Shift and Tab** to go back. When an error message appears, the field requires an entry before going back. Enter a character in the field, then **Shift and Tab** to go back.