



## Budget Adjustment

This document describes the processes for increasing a budget, decreasing a budget, or transferring funds, and provides examples of various budget changes.

### General Instructions

When budgeting funds there **cannot** be a budget in the Resource Group (Expenditure Category) and the Resource (Expenditure Type) concurrently.

**When transferring funds always do the decrease first** whether the transfer is from one project to another, one task to another, or between categories in the same budget.

**Reminder:** When entering funds, always use the first column in the "Award Budgets" form that coincides with the Award/Project/Task dates.

## Transfer of Funds

### Transfer of Funds Between Categories on an Existing Budget

1. Navigate to the Award Budget form, enter the Award Number, click Find, click Open.
2. Reduce amounts in appropriate categories and Save changes.
3. Increase amounts in appropriate categories and Save changes.
4. Go to the Project Budgets form and Submit and Baseline the budget.

### Transfer of Funds from One Project to Another or One Task to Another

1. Decrease the budget on the project or task the funds are being transferred from. See the Budget Decrease section of this document.
2. Increase the budget on the project or task the funds are being transferred to. See the Budget Increase section of this document.

For detailed instructions, refer to the Process Help, [Modify Award and Project Budget](#).

#### Budget Decrease

1. Go to the Award Budget form.
2. Reduce amounts in appropriate categories and Save changes.
3. Go to the Project Budgets form and Submit and Baseline the budget.
4. Reduce project funding on the award.
5. Reduce installment amount (if necessary).

For detailed instructions, refer to Process Help, [Modify Award and Project Budget](#) and [Adjust Project Funding](#).

#### Budget Increase

1. Increase installment amount on the award (if necessary).
2. Increase project funding on the award.
3. Go to the Award Budget form.
4. Increase amounts in appropriate categories and Save changes.
5. Go to the Project Budgets form and Submit and Baseline the budget.

For detailed instructions, refer Process Help, [Modify Award and Project Budget](#) and [Adjust Project Funding](#).

#### Example 1: Task to Task, Same Project and Award

##### **Situation**

Need to move funds from Task 1 to Task 2 on the same project and award.

##### **Process**

1. Go to Task 1 Award Budget form. Reduce award budget and Save changes. Submit and Baseline the budget.
2. Go to the Project Budget form and Submit and Baseline the budget.
3. Go to the Award and reduce the funding on Task #1 and Save changes.
4. Increase funding on Task 2 and Save changes.
5. Go to Task 2 Award Budget form. Increase award budget and Save changes. Submit and Baseline the budget.
6. Go to Project Budget form and submit and Baseline the budget.

#### Example 2: Project to Project Funded by Same Award

##### **Situation**

Need to move funds from Project 1/Task 1 to Project 2/Task 1 on the same Award.

##### **Process**

1. Go to Project 1/Task 1, Award Budget form. Reduce award budget and Save changes. Submit and Baseline the budget.
2. Go to the Project Budget form and Submit and Baseline the budget.
3. Go to the Award and reduce the funding on Project 1/Task 1 and Save changes.
4. Increase funding on Project 2/Task 1 and Save changes.
5. Go to Project 2/Task 1, Award Budget form. Increase award budget and Save changes. Submit and Baseline the budget.
6. Go to Project Budget form and submit and Baseline the budget.

#### Example 3: One Project/Task/Award to Different Project/Task/Award

##### **Situation**

Need to move funds from Project 1/Task 1/Award 1 to Project 2/Task 1/Award 2.

##### **Process**

1. Go to Project 1/Task 1/Award 1, Award Budget form. Reduce award budget and Save changes. Submit and Baseline the budget.
2. Go to the Project Budget form and Submit and Baseline the budget.
3. Go to the Award 1, reduce the funding on Project 1/Task 1 and Save changes. Reduce installment and Save.
4. Go to Award 2, increase installment and Save. Increase funding on Project 2/Task 1 and Save.
5. Go to Project 2/Task 1/Award 2, Award Budget form. Increase award budget and Save. Submit and Baseline the budget.
6. Go to Project Budget form and submit and Baseline the budget.