

How to Initiate a Budget Modification Request

The budget modification process enables departments to submit requests to the Budget Department to reallocate funds between accounts. The Sharepoint site is setup to facilitate this process. There are three roles assigned in Sharepoint to accomplish the transfer: Requesters; Departmental Approvers; and Budget Approvers. A departmental Requester fills out a request, the request is submitted to the Budget Department for approval. Interdepartmental transfers or transfers of large sums may be forwarded by the budget department to you corresponding Departmental Approver for their approval. You will be able to track the status of your request online. If a request is approved, it will be assigned a Journal ID enabling you to verify the transfer. If the request is denied, comments will be attached, allowing you to address any outstanding issues a resubmit your request if appropriate.

QuickStart

1. Access CUNYfirst and determine whether funds are available and obtain proper account codes.
2. Go to Budget Modification Sharepoint Site Home Page.
<https://one.hunter.cuny.edu/budmod/SitePages/Home.aspx>
3. Click on "Initiate a Budget Modification Request".
4. Fill out form.
5. Click on the "Save" button.
6. Proof your request transaction on the list view of your entries.
7. To enter additional requests click on "add a new item" and fill in additional forms. Repeat.
8. Each request transaction is immediately available for the Budget Department to review.
9. Edit request if necessary.
10. The progress of your request can be checked on the Budget Modification Status Page.
<https://one.hunter.cuny.edu/budmod/Lists/Budget%20Modifications/Request%20Status.aspx>
11. Either your manager or the Budget Department can deny your request. If denied, you can resubmit a request.

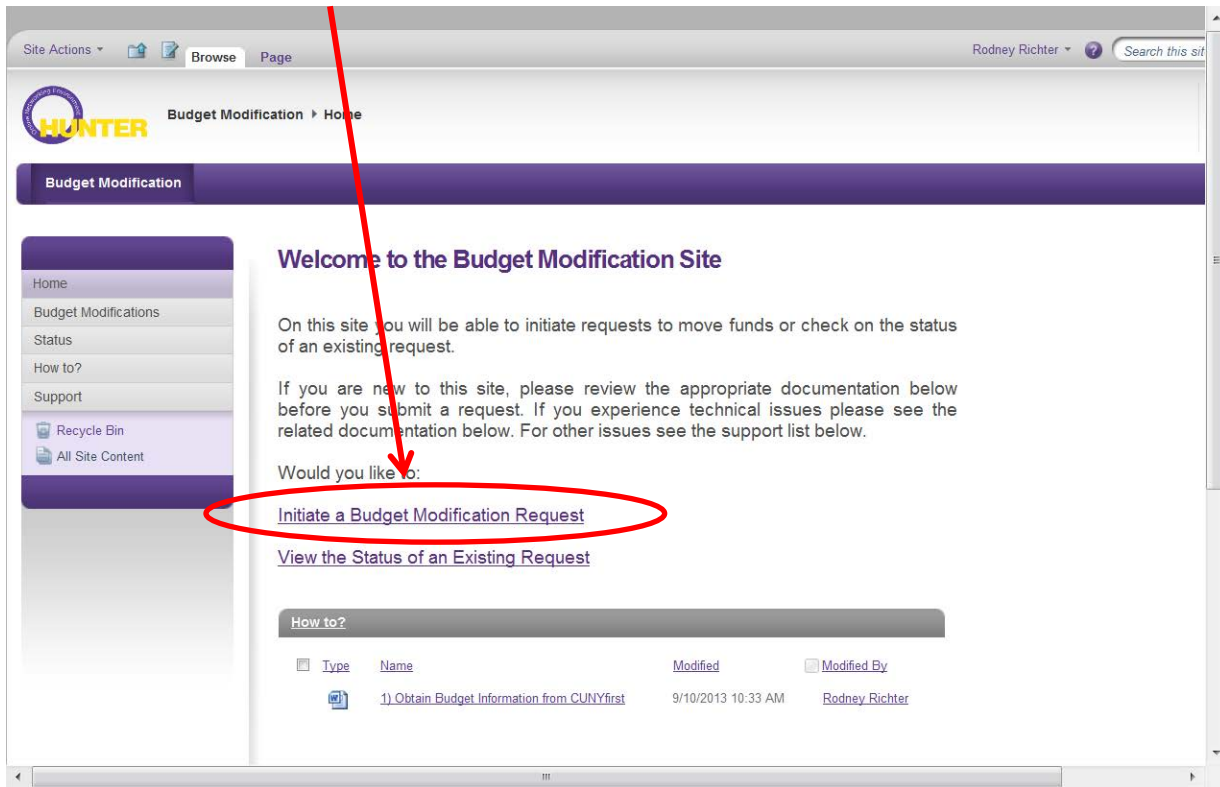
Detailed Description of the Budget Modification Request Process

12. Access CUNYfirst and determine whether funds are available. A detailed description of how to access CUNYfirst account information is provided in "How to" section.

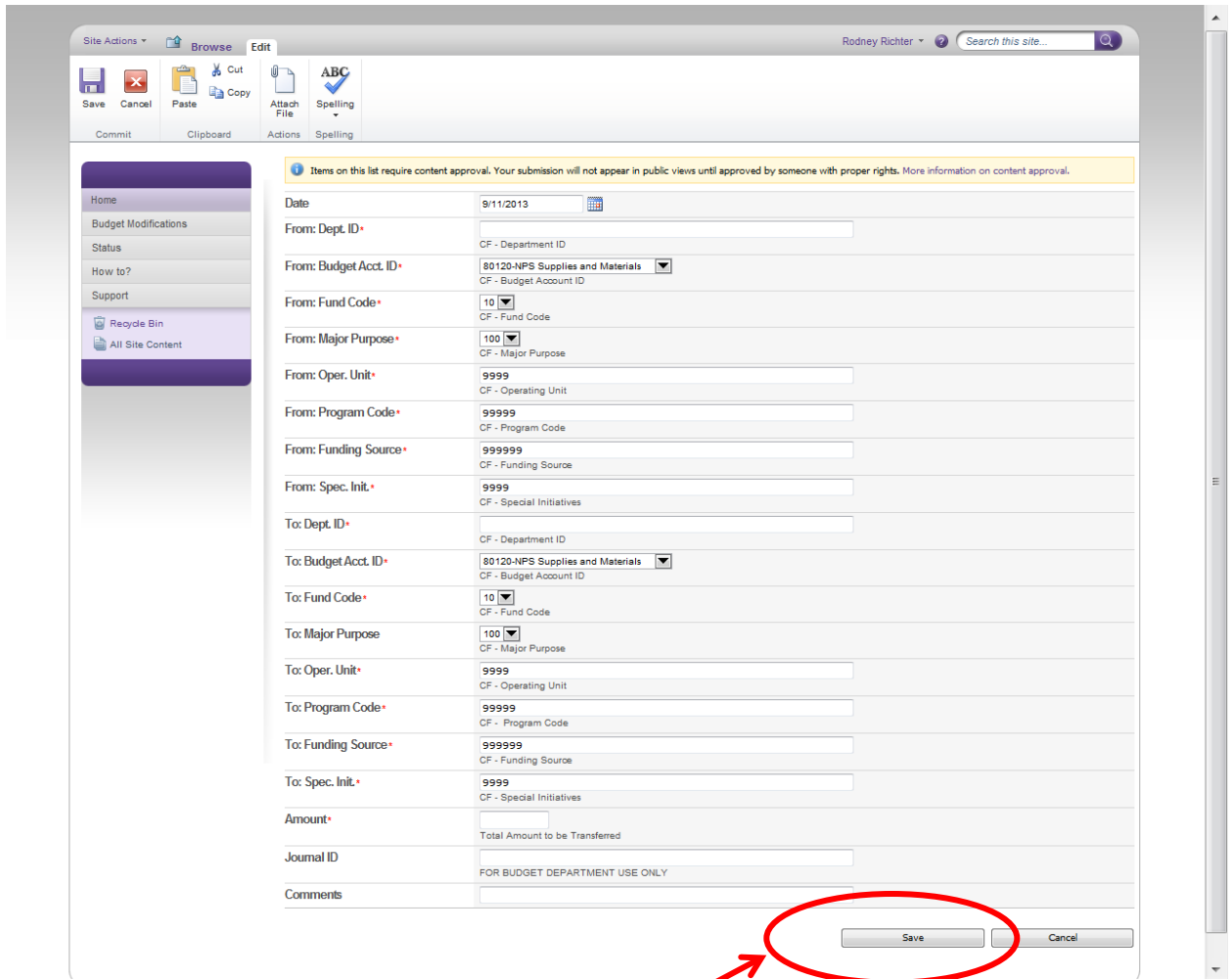
Obtain proper account codes with corresponding fund, department , major purpose, etc. codes for the account you would like to move funds from. Likewise, determine same for account you would like to move the funds to.

13. Go to Budget Modification Sharepoint Site Home Page.
<https://one.hunter.cuny.edu/budmod/SitePages/Home.aspx>

14. Click on "Initiate a Budget Modification Request".

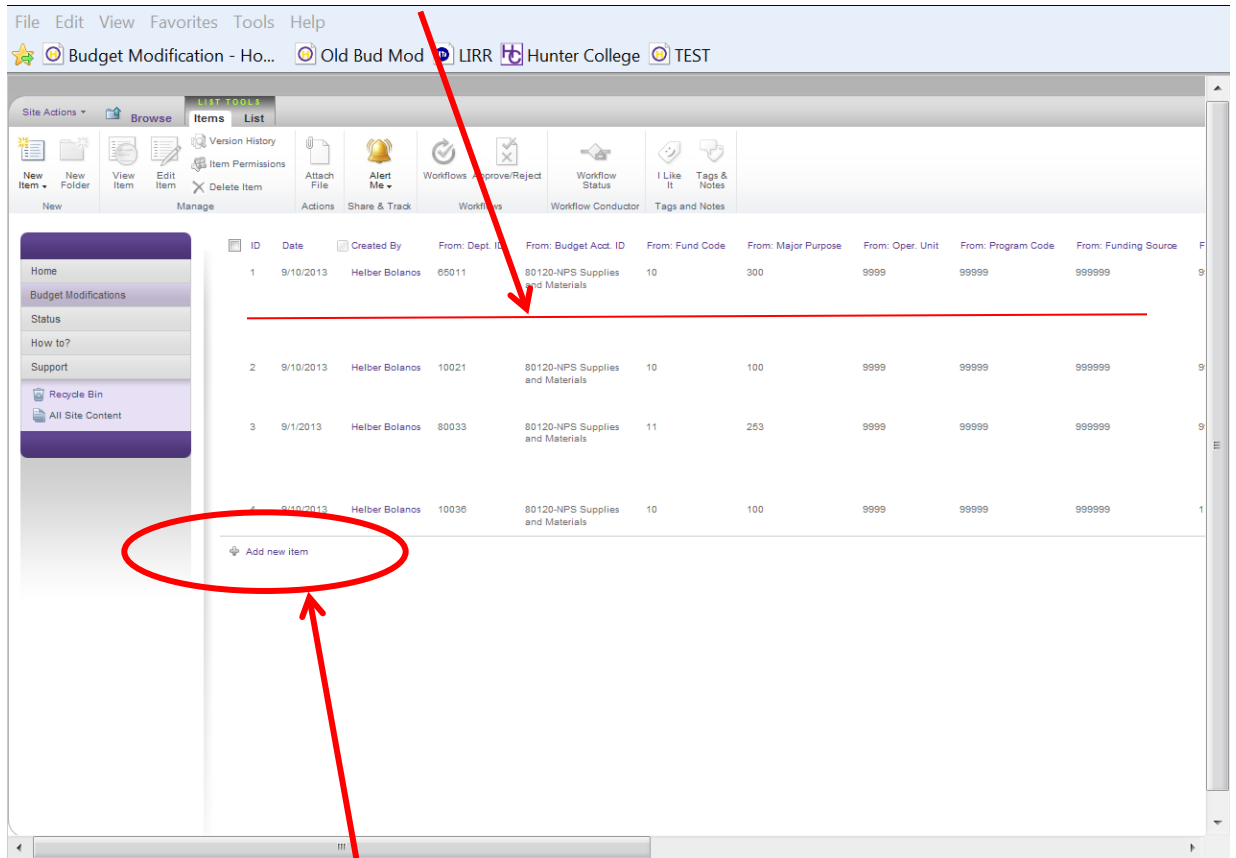


15. The form shown below will popup. Most form fields are self explanatory. The input data mirrors the fields used in CUNYfirst. Transactions must be in equal amounts between two accounts. (eg. A transaction of \$5,000 moving \$1,000 to five different accounts would require moving \$1,000 in five separate transactions. Each transaction requires and separate submission.

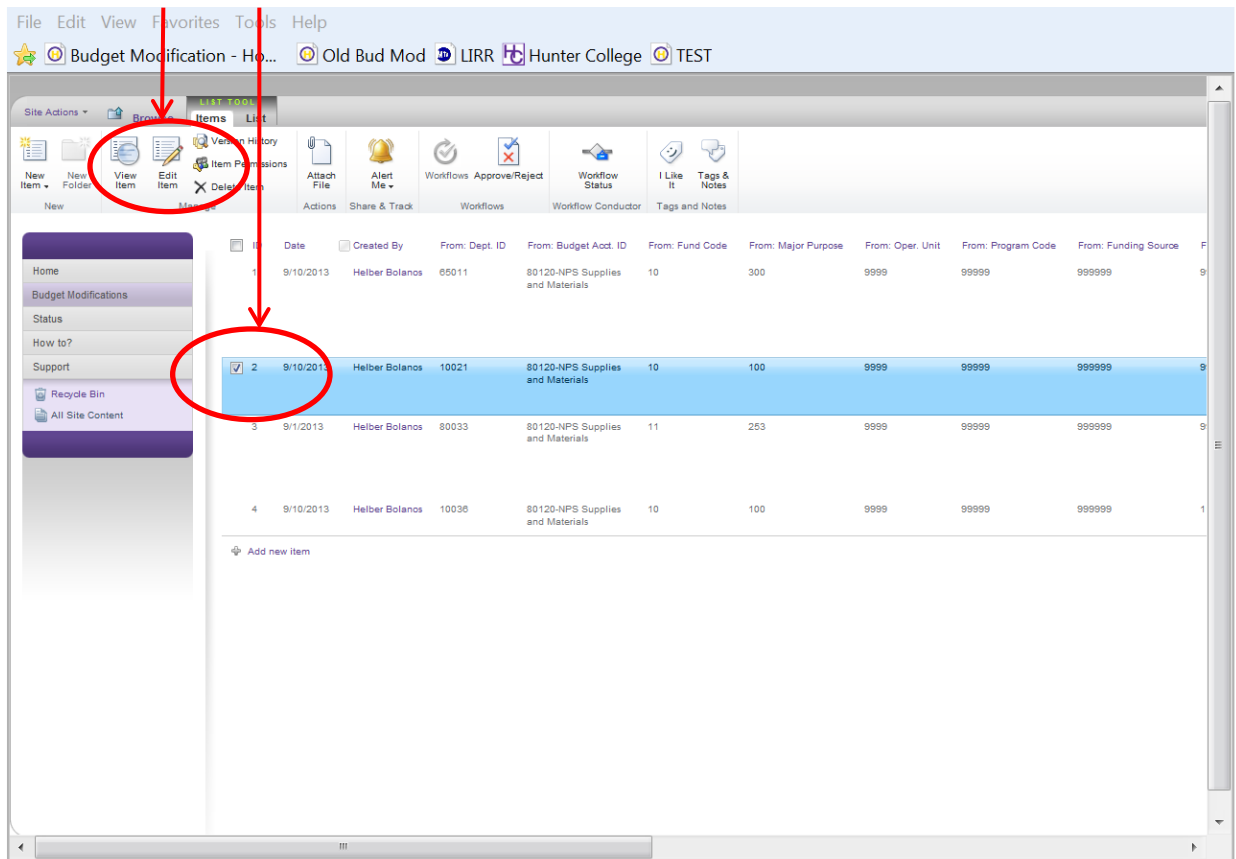


16. Once you have entered your first transactions click on the “Save” button to view your transactions in spreadsheet format.

17. Proof your request transaction on the list view of your entries.



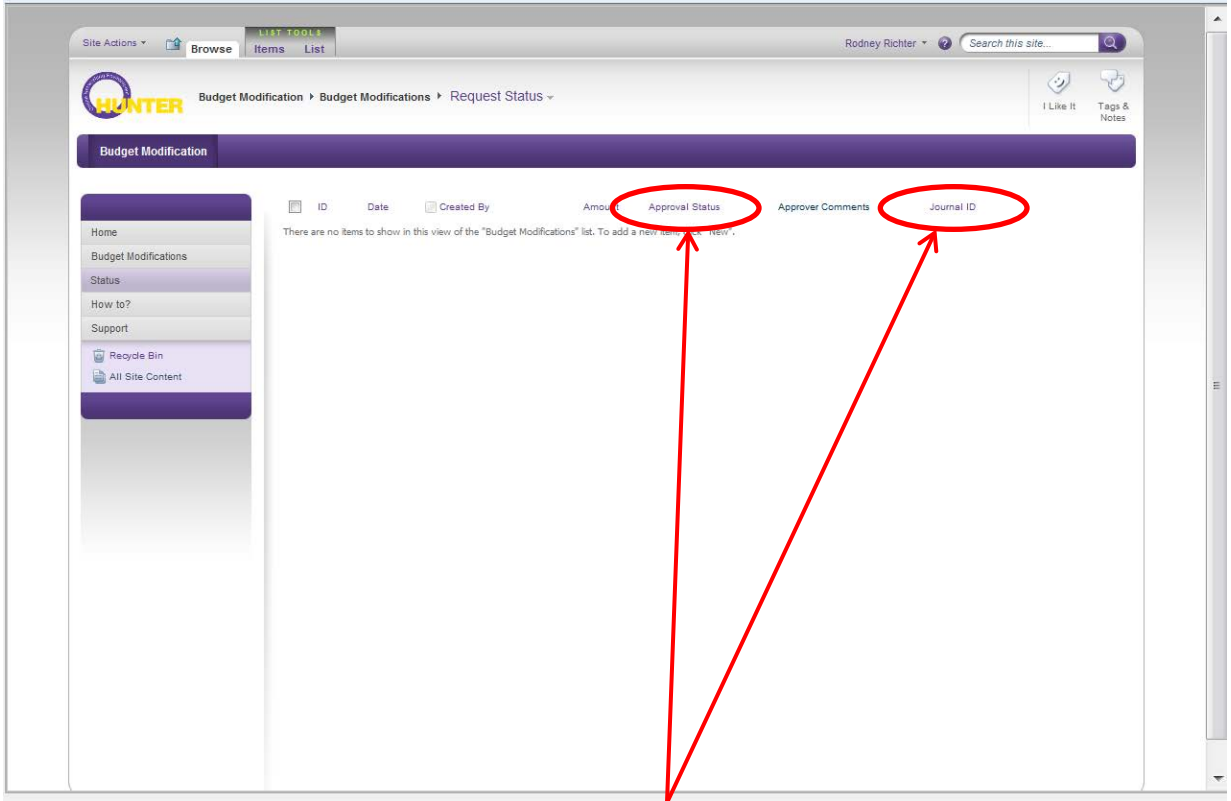
18. To enter additional requests click on “add a new item” and fill in additional forms. Repeat.
19. Each request transaction is immediately available for the Budget Department to review.
20. To edit an existing request (see screenshot below), click on the checkbox next to the item you would like to amend. Click on “edit item” and make any necessary changes. Click “Save” when done.



21. The progress of your request can be checked on the Budget Modification Status Page (See below).

<https://one.hunter.cuny.edu/budmod/Lists/Budget%20Modifications/Request%20Status.aspx>

Your request will be assigned at unique ID for tracking purposes (eg. ID:1).



Under the “Approval Status” column you can see the status of your request. The status are:

- Approved + Journal ID = Your request has been approved and entered into CUNYfirst ,
- Approved, no Journal ID = Approved by Departmental Approver and awaiting final approval by the Budget Department,
- Pending = Awaiting approval by Departmental Approver and/or Budget Department,
- Rejected = Denied by Departmental Approver and/or Budget Department.

22. Either your manager or the Budget Department can deny your request. The denied request will contain a comments field to inform you of the reasons for denial. If denied, you can initiate a new request and repeat the process. Or you can open the existing request from the Budget Modification Page, correct any errors, and "save".