

Please reference examples used to assist with the completion of the Budget Adjustment Request Form.

Hint: It may be helpful to complete the "Use" section first in order to determine the amount of Sources needed to be transferred. Note that benefits auto-populate in both the Decrease and Increase sections of the form.

Example #1:

- Transfer Source of \$2,171.20 from Fund 119001 Org 4900 to Fund 119001 Org 4700.
- Use Budget decrease in Extra Help Acct 60022 for Fund 119001 Org 4900 of \$2,000 plus benefit adjustment
- Use Budget increase in Student Assistant Acct 60022 for Fund 119001 Org 4700 of \$2,000 plus benefit adjustment

**MARSHALL UNIVERSITY
BUDGET ADJUSTMENT REQUEST FORM
2016-17**

	FUND ¹	ORG	ACCT ²	AMOUNT		FUND ¹	ORG	ACCT ²	AMOUNT	
Sources (Decrease)					Sources (Increase)					
Revenue Adjustments (Decrease)					Please submit MU Funding Request Form to increase revenue budget.					
BD04				-						
BD04				-						
BD04				-						
Transfer From					Transfer To					
BD04	119001	4900	5T0050	2,171.20	-	119001	4700	5T0050	2,171.20	+
Source Changes				2,171.20					2,171.20	

	FUND ¹	ORG	ACCT ²	AMOUNT		FUND ¹	ORG	ACCT ²	AMOUNT	
Uses (Decrease)					Uses (Increase)					
BD04	119001	4900	60022	2,000.00	-	119001	4700	60022	2,000.00	+
BD04				-						
BD04				-						
BD04				-						
BD04				-						
BD04				-						
BD04	119001	4900	6999B	171.20	-	119001	4700	6999B	171.20	+
Use Changes				2,171.20					2,171.20	

XFT2	119001	4900	5T0050	2,171.20	+	119001	4700	5T0050	2,171.20	-
									Doc total	\$ 13,027.20

Change to Net Budget ³ 0.00 0.00

Change to Use Budget ⁴ 0.00

Purpose:	Transfer non-classified temp from 4900 to 4700
Entry description:	

Submitted by:	date:	
Approved by:	date:	

¹ Transfers can only be made between funds with the same two middle digits (eg. 119001 to 119015)

One form must be submitted for each from/to fund/org combination.

- ² Source Accts: 5T0050 Internal Temp Transfer - within the same Unit or College
 5T0055 Unit to Unit Temp Transfer
 5T0045 Provost Support Transfer
- Use Accts: 70024 Budget Supplies & Other
 60015 Graduate Assistant
 60016 Student Assistant
 60017 Part-time Faculty
 60018 Casual Help
 60022 Non-classified Temporaray
 60020 NC Contractual Supp Pay
 6001C2 Summer Faculty
- 60023 Classified Temporary
 6001F Overtime
 6001R Faculty Research
 6001S Stipends
 6001T Cell Phone Stipend
 6001U Internet Stipend
 6999B Benefits-Part-time

³ **Change to Net Budget** - if negative, cannot exceed Adjusted Budget "Net: Revenue minus (Labor + Expenditures + Transfers)" field on FGIBSUM. Note - if From and To amounts are within the same fund/org, Change to Net Budget From and To should be considered in total.

⁴ **Change to Use Budget** - if net change is negative, please submit MU Funding Request Form found at www.marshall.edu/finance/forms listed under Budget.

Example #2:

- Transfer Source of \$3,800 from Fund 119002 Org 4900 to Fund 119002 Org 4700.
- Use Budget decrease in Graduate Assistant Acct 60015 for Fund 119002 Org 4900 of \$3,800.
- Use Budget increase in Graduate Assistant Acct 60015 for Fund 119002 Org 4500 of \$2,000.
- Use Budget increase in Budget Supplies & Other Acct 70024 for Fund 119002 Org 4500 of \$1,800.

**MARSHALL UNIVERSITY
BUDGET ADJUSTMENT REQUEST FORM**

2016-17

	FUND ¹	ORG	ACCT ²	AMOUNT		FUND ¹	ORG	ACCT ²	AMOUNT	
Sources (Decrease)					Sources (Increase)					
Revenue Adjustments (Decrease)					Please submit MU Funding Request Form to increase revenue budget.					
BD04				-						
BD04				-						
BD04				-						
Transfer From					Transfer To					
BD04	119002	4900	5T0050	3,800.00	-	119002	4500	5T0050	3,800.00	+
				Source Changes						3,800.00

	Uses (Decrease)					Uses (Increase)				
BD04	119002	4900	60015	3,800.00	-	119002	4500	60015	2,000.00	+
BD04					-	119002	4500	70024	1,800.00	+
BD04					-					+
BD04					-					+
BD04					-					+
BD04			6999B	0.00	-			6999B	0.00	+
				Use Changes						3,800.00

XFT2	119002	4900	5T0050	3,800.00	+	119002	4500	5T0050	3,800.00	-
									Doc total \$	22,800.00

Change to Net Budget ³

Change to Use Budget ⁴

Purpose:	Transfer from 4900 to 4500, reduce 4900 GA budget, increase 4500 GA and Supplies and Other Budget.
	Entry description:

Submitted by:		date:	
Approved by:		date:	

¹ Transfers can only be made between funds with the same two middle digits (eg. 119001 to 119015)

One form must be submitted for each from/to fund/org combination.

² Source Accts: 5T0050 Internal Temp Transfer - within the same Unit or College

5T0055 Unit to Unit Temp Transfer

5T0045 Provost Support Transfer

Use Accts: 70024 Budget Supplies & Other

60015 Graduate Assistant

60016 Student Assistant

60017 Part-time Faculty

60018 Casual Help

60022 Non-classified Temporaray

60020 NC Contractual Supp Pay

6001C2 Summer Faculty

60023 Classified Temporary

6001F Overtime

6001R Faculty Research

6001S Stipends

6001T Cell Phone Stipend

6001U Internet Stipend

6999B Benefits-Part-time

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Example #3

- Source Budget decrease for Fund 119301 Org 2300 of \$12,000.
- Use Budget decrease in Budget Supplies & Other Acct 70024 for Fund 119301 Org 2300 of \$12,000

**MARSHALL UNIVERSITY
BUDGET ADJUSTMENT REQUEST FORM
2016-17**

	FUND ¹	ORG	ACCT ²	AMOUNT		FUND ¹	ORG	ACCT ²	AMOUNT		
Sources (Decrease)						Sources (Increase)					
Revenue Adjustments (Decrease)						Please submit MU Funding Request Form to increase revenue budget.					
BD04	119301	2300	556700	12,000.00	-						
BD04					-						
BD04					-						
Transfer From						Transfer To					
BD04					-			0	0.00	+	
Source Changes				12,000.00						0.00	

	Uses (Decrease)					Uses (Increase)				
BD04	119301	2300	70024	12,000.00	-					+
BD04					-					+
BD04					-					+
BD04					-					+
BD04					-					+
BD04					-					+
BD04			6999B	0.00	-			6999B	0.00	+
Use Changes				12,000.00						0.00

XFT2					+					-
								Doc total \$	24,000.00	

Change to Net Budget ³ 0.00 0.00

Change to Use Budget ⁴ -12,000.00

Purpose:	Reduce source Private Gifts - Other budget and use Budget Supplies & Other Services by \$12,000 each.
Entry description:	

Submitted by:	date:	
Approved by:	date:	

¹ Transfers can only be made between funds with the same two middle digits (eg. 11 9001 to 119015)

One form must be submitted for each from/to fund/org combination.

- ² Source Accts: 5T0050 Internal Temp Transfer - within the same Unit or College
 5T0055 Unit to Unit Temp Transfer
 5T0045 Provost Support Transfer
- Use Accts: 70024 Budget Supplies & Other
 60015 Graduate Assistant 60023 Classified Temporary
 60016 Student Assistant 6001F Overtime
 60017 Part-time Faculty 6001R Faculty Research
 60018 Casual Help 6001S Stipends
 60022 Non-classified Temporaray 6001T Cell Phone Stipend
 60020 NC Contractual Supp Pay 6001U Internet Stipend
 6001C2 Summer Faculty 6999B Benefits-Part-time

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Example #4

- Use Budget decrease in Student Assistants Acct 60016 for Fund 119002 Org 2066 of \$3,000.
- Use Budget increase in Budget Supplies & Other Acct 70024 for Fund 119002 Org 2066 of \$3,000

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	FUND ¹	ORG	ACCT ²	AMOUNT		FUND ¹	ORG	ACCT ²	AMOUNT	
Sources (Decrease)					Sources (Increase)					
Revenue Adjustments (Decrease)					Please submit MU Funding Request Form to increase revenue budget.					
BD04				-						
BD04				-						
BD04				-						
Transfer From					Transfer To					
BD04				-				0	0.00	+
Source Changes				0.00					0.00	

	Uses (Decrease)					Uses (Increase)				
BD04	119002	2066	60016	3,000.00	-	119002	2066	70024	3,000.00	+
BD04				-						+
BD04				-						+
BD04				-						+
BD04				-						+
BD04				-						+
BD04			6999B	0.00	-			6999B	0.00	+
Use Changes				3,000.00					3,000.00	

XFT2					+					-
									Doc total \$	6,000.00

Change to Net Budget ³ 3,000.00 -3,000.00

Change to Use Budget ⁴ 0.00

Purpose:	Decrease Student Assistant Use budget and Increase Budget Supplies & Other Services direct expenditure budget by \$3,000 each.
	Entry description:

Submitted by:		date:	
Approved by:		date:	

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One form must be submitted for each from/to fund/org combination.

² Source Accts: 5T0050 Internal Temp Transfer - within the same Unit or College
5T0055 Unit to Unit Temp Transfer
5T0045 Provost Support Transfer

Use Accts: 70024 Budget Supplies & Other
60015 Graduate Assistant
60016 Student Assistant
60017 Part-time Faculty
60018 Casual Help
60022 Non-classified Temporaray
60020 NC Contractual Supp Pay
6001C2 Summer Faculty

60023 Classified Temporary
6001F Overtime
6001R Faculty Research
6001S Stipends
6001T Cell Phone Stipend
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6999B Benefits-Part-time

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