



# Guidelines for Using, Completing & Submitting Budget Adjustment Template (BAT):

## Template Usage:

- For coordination of **budget adjustments only**
- **Not** applicable to accounting cost transfers or other transactions involving **actual** revenues or expenses
- **Not** to be used for requests of University funding allocations

## Formatting:

- Existing formatting facilitates efficient and accurate budget adjustment processing. Formatting is **not** to be changed.
- Add rows if needed to complete request.
- Do **not** leave blank rows between budget adjustments.

## Completion:

- Provide **all** administrative information in upper right corner.
- Populate **all** fields for every budget adjustment requested; complete and accurate information is **required**.
- Provide meaningful descriptions that include key words and logical abbreviations. Descriptions will appear with corresponding budget adjustments in Ignite reports.
- **T** or **P** must be indicated for each budget adjustment to classify as temporary or permanent.
- Save template upon completion, and use standard naming convention for each template that includes Business Officer's initials and submission date. Example: BD-030223

## Amounts:

- Indicate all amounts as **increases/decreases**. Do **not** specify revised budget amounts. Adjustments will be **incremental** changes to existing budgets.
- Represent budget increases as positive amounts. Represent budget decreases as negative amounts. Do **not** apply accounting debit/credit methodology for revenues or expenses.
- All amounts **must** be in even dollars and **not** include cents.
- **Amounts must sum to zero. Adjustments must equally offset. Total amount of revenue adjustments must equal total amount of expense adjustments.**
- Revenues are **not** "moved" to expenses; they **offset** each other.

## Submission:

- Business Officer **must** review and submit **all** approved budget adjustment templates to [Budget\\_Support@baylor.edu](mailto:Budget_Support@baylor.edu)
- Submission of template by Business Officer to Planning and Budgeting confirms review and approval of budget adjustments requested, and that template is ready for processing.
- Business Officer is responsible and accountable for budget adjustments coordinated.

## Processing:

- Planning and Budgeting will conduct high level review, such as balance confirmation and CoA segment validation/completion, then upload budget adjustments into Ignite.
- Following posting of budget adjustments in Ignite, Planning and Budgeting will email notification of process completion to Business Officer.
- Planning and Budgeting will save template in Entity's budget adjustment file in Box so that submitted template will be accessible for future reference.