

Overview

This job aid will provide instructions on how to create, review, approve/deny or send back a budget amendment request and look up its status. The approval process is as follows:



Create Budget Amendment Request

1. The Budget Amendment Request process is provided to users with Adaptive Planning access.
2. In the Workday search bar, type **Create Request** and press enter. Select the **Create Request Task**.
3. For the request type, select **All** and then click **Budget Amendment Request** and click OK.

4. You can enter up to four budget amendment requests on the form. Provide an explanation as to why the budget amendment request(s) are needed. Be as thorough as possible. For each request, enter the amount to transfer and the full FOAP (Fund, Organization, Account, Program) and if applicable, Discipline and Specialization, in the TO and FROM fields.

5. If you are ready to submit your request, click **Submit**. If not, click **Save for Later** to save or **Cancel** if you want to delete the request.
6. After submitting your request, you will receive a pop-up confirmation that it was submitted.

Cost Center Manager review/approval process

1. Once the budget amendment request is submitted, the Cost Center Manager will receive a notification in Workday to review the request. If the CCM was the initiator, the request will then automatically go to the Budget Director for review.
2. After the CCM has reviewed the request, they can click **Approve** to approve the request.
3. Or, to send the request back to the initiator for revisions, click **Send Back**. Select the initiator's name and enter the reason in the field provided. Then, click **Submit**.

Budget Amendment Request Workday Job Aid

4. (Optional) If the CCM wants to approve the request AND add additional approvers to the process, they can click the **Add Approvers** button and enter the additional approver's name. Provide a comment in the provided field and then click the **Approve and Send to Approvers** button.

Add Approvers

The next step in the process will not happen until the additional approvals are done.

Additional Approvers *

Comment

5. To deny the request, click the three dots button, select **Deny** and enter the reason the request is being denied in the field provided.

Deny

Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.

Reason *

6. Once the request process is completed, the initiator and all approvers (including the CCM and ad-hoc approvers) will be sent a notification with the request status. To view the notification, click on the bell icon.

Request Process: Budget Amendment Request: Brad Vacura

9 minute(s) ago

Successfully Completed

[Details](#) [Request Process: Budget Amendment Request: Brad Vacura](#)

Check the status of Budget Amendment Requests

- At any time in the request process, the initiator can check the status of their budget amendment request(s) by accessing the **My Requests Report**.
- Type **My Requests**, press enter, and select the **My Requests Report**. The My Requests screen appears with a listing of all your requests.
- Go to the Budget Amendment Request. In the Request column, click the related actions button (three dots) and then click **Business Process**.
- The View Event page will appear which lists the details of each step in the process and the overall status of the request.

Request	Related Actions
Request: Budget Amendment Request: Brad Vacura	<input type="button" value="..."/> Business Process