Single Sided Budget Adjustment

Document Overview:

The Single Sided Budget Adjustment (SSBA) is primarily used by The Budget Office for unique purposes, such as: to establish carryforward, process payments of central loans, and create budget for new Work In Progress accounts. Unlike a regular budget adjustment, the SSBA does not require to balance the account line amounts on both the “To” and “From” side of the document. You can only have one accounting line added on the “To” or “From” side of the document to be able to submit the document. If a department is considering creating an SSBA first reach out to the Budget Office to see if this is the correct document to use.

The document has a From/Decrease section and a To/Increase section.

If the budget needs to be decreased, then the account information will be put in the From section. If the budget needs to be increased, then the account information will be put in the To section.

To be able to create this document the user must have Role 54 in Kuali.

How to Complete the Document:

The Document Overview section contains the fields titled “Description” as well as “Explanation”. It is required that the description field is populated for every KFS document created. The Description field should include a brief statement of the document’s purpose. The description should be concise since the field is limited to 40 characters. The “Explanation” field can be used to elaborate on the description since the character restriction in the Explanation field exceeds 400 characters. The goal between the Description and Explanation is to provide a clear understanding of the document’s purpose in the event the reviewer/approver needs further information or for audit purposes.
The Accounting Lines section is where the initiator inputs which account and object code the budget needs to decrease or increase from.

It is recommended supporting documentation be attached to the transaction for an audit trail. It is required to be in PDF format within the Notes and Attachments section. The documentation can be an email, spreadsheet or document like an MOU, etc. that further explains why the adjustment is needed and answers any questions related to the transaction being submitted so the reviewer and approvers of the transaction get a clear understanding and eliminates the need to contact the initiator for further explanations.

Document Routing:

This document routes to the Fiscal Officer, Organization approver, and Division Approver (only if document is over $10,000). In the screen shot that follows, the document was ad hoc routed to Angela Nielsen. When ad hoc is used, it first goes to that individual before it goes through the normal routing.
Document Exceptions/Restrictions:

Below are the list of parameters related to the SSBA document. If the Constraint Code is “A” it means “Allowed” and if “D” it means “Disallowed”.

Below is the allowed parameters:

1. Allows the use of the following subfunds:
   CPLB; CPAD; CPOTH; CPRR; RESERV; CAPGEN; CAPAUX; RECHAR; GENOP; SPWIP; INSURE; RARSP; EG; PVM; EXP STA; EXTEN; CSFS; CSFSSF; HEAFORE; WPF; WERF; FRP; PMSTA; ENTERP; GIFT; ATHLET; 1EG; 1GIFT; 1ATHLE; 1G ENOP; 1CAPAU; 1CAPGE; 1RESER; 1CPRR; 1CPOTH; 1CPAD; 1CPLB; DCESUP; SUSPEN; 1AEP; 1RARSP; 1DCESU; BG OG; 1RECHA

Below is the explanation of the restrictions:

1. The following object codes are restricted from use on this document:
   2000; 2100; 2200; 2300; 2400; 2500; 2600; 2700; 6050
2. The following Object Sub Types are restricted from use on this document:
   CA; AR; MT; AM; BD; CM; SO; CS; CF; LA; LE