
Request for Budget Adjustment Form Instructions

For basic navigation instructions of Frevvo forms, go here:

https://tams.tulane.edu/sites/tams.tulane.edu/files/Frevvo_Basic_Navigation_Instructions_Revised.pdf

IMPORTANT: Please note that you may be required to log in with your Tulane user ID and password when you open the form

Request for Budget Adjustment Form



Request for Budget Adjustment

Requested Accounting Period

MAR-21

1

This Budget Adjustment should affect:

This Fiscal Year only

2

This Fiscal Year and Subsequent Fiscal Years

Request Date

3/30/2021

3

Are you a member of the Central Budget Office?

Yes

4

Is the budget increase and the budget decrease for the same department?

Yes

5

No

Initiator First Name

Peter

6

Initiator Last Name

Simonson

Initiator Email

psimons@tulane.edu

1. Include the period in which you'd like the adjustment posted (i.e. JAN-21, FEB-21, MAR-21 etc.)
2. If the budget adjustment only affects the current fiscal year, click the "This Fiscal Year only" button; otherwise, click the "This Fiscal Year and Subsequent Fiscal Years" button
3. The date you initiate the form will default here
4. Click Yes ONLY if you are a staff member of the Tulane Central Budget Office
5. If both the account budget increased and the account budget decreased roll to the same department, click Yes; if the accounts reside in different departments, click No
 - If you choose No, you will later be prompted to include the approvers for both sides of the entry for the purpose of approval workflow
6. The initiator's Tulane credentials will default here; write protected



Request for Budget Adjustment Form – More Than 20 Lines

If you are entering more than 20 transactions, please use the spreadsheet template located at the link below and attach the completed spreadsheet to this form. Click Yes below to upload.

Yes  

 [Spreadsheet Template](#)



If you are entering more than 20 transactions, please use the spreadsheet template located at the link below and attach the completed spreadsheet to this form. Click Yes below to upload.

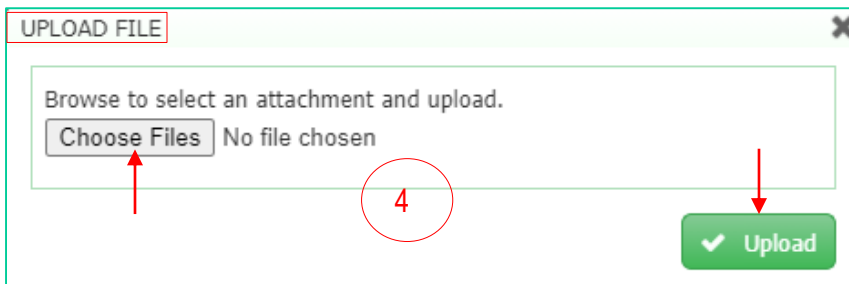
Yes  

 [Spreadsheet Template](#)

Upload Transactions

 [Add Files](#)



1. If you have more than 20 lines on the budget adjustment, click Yes; otherwise, navigate to the next section of the form (see next page)
2. If you clicked Yes indicating you have more than 20 lines, click the Spreadsheet Template button to open an enterable spreadsheet template and enter your data; once you complete the form, save it to your preferred file location
3. Click the Add Files button to open an Upload File dialogue box
4. Click Choose Files to open your computer's file explorer then double-click on the spreadsheet you created; click the Upload button to attach the spreadsheet to the form

Request for Budget Adjustment Form

Reference/Justification

3RD Quarter Budget Adjustment per the request of the Provost's Office

1

1. Required field. Add a justification and/or all reference information regarding the budget adjustment

Request for Budget Adjustment Form

Debit (Increase expense account budgets; decreases revenue account budgets)

Organization Number 1

36040

	Account	Nat Acct	Dept Use	Amount
+	236224	6311		50.00

Total

50.00

Debit Dean, Director or VP Approval Information 2

Please enter the Dean, Director, or VP who needs to approve this request below:

Dean/Director/VP First Name Dean/Director/VP Last Name Dean/Director/VP Email

Peter Simonson psimons@tulane.edu

Credit (Decreases expense account budgets; increases revenue account budgets)

Organization Number 3

36040

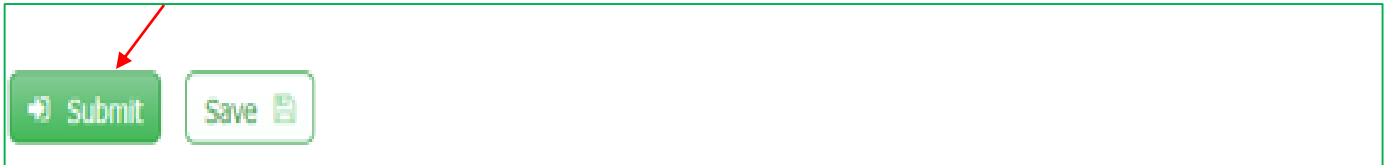
	Account	Nat Acct	Dept Use	Amount
+	236228	6311		50.00

Total

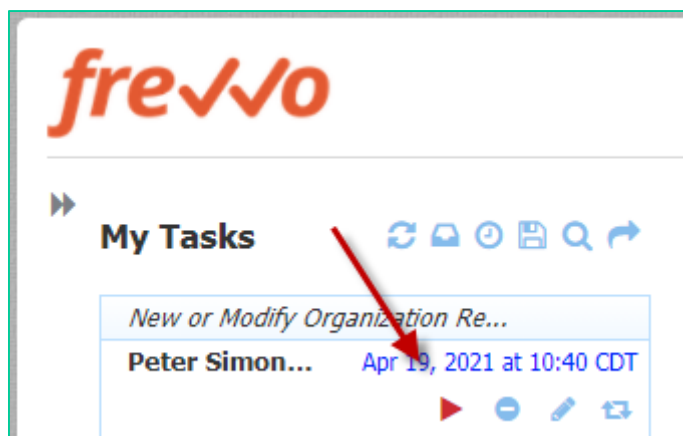
50.00

1. Include org, account, natural account and dept use code (if applicable) and debit amount
2. Enter the name and email of the authorized approver of the budget adjustment request; this field is validated and must be a Tulane email address
3. Include org, account, natural account and dept use code (if applicable) and credit amount
 - If you indicated that the budget adjustment debit and credit were for different departments (see page 2, #5), there will be a separate field requiring you to enter the name and email address of the credit approver

Request for Budget Adjustment Form



- If the form is complete and ready to be processed, click the Submit button
 - Once you click Submit, the form will begin routing through workflow based on the approvers you identified and will be processed once all approvals are complete
 - When the form is in the final stage for processing, as the initiator, you will receive a pdf copy of the final form
- If you are not finished with the form and would like to come back to it at a later time before submitting it, click the Save button
 - You can re-access the saved form by logging into Frevvo at <https://forms.tulane.edu>
 - Go to My Tasks and click the “play button” (red triangle) next to the form to open it



Request for Budget Adjustment Form - Approvals

- See pages 12 through 18 on the following Basic Navigation manual for details regarding approval instructions:
https://tams.tulane.edu/sites/tams.tulane.edu/files/Frevvo_Basic_Navigation_Instructions_Revised.pdf