



# EKU Banner Finance

## Anatomy of a Budget

- **BD01** – Adopted Budget (July 1 Beginning Budget)
- **BD02** – Permanent Budget (ongoing change to budget year after year)
- **BD03** – Temporary Budget (change to budget for current fiscal year only)
- **BD04** – Encumbrance (similar to carry forward)
- **BD05** – Carry Forward (budget balance from prior year; does not apply to all Orgs)

## Periodic Budget Adjustments from M&O

- ✓ Overtime & Extra-Time
- ✓ Work Study budget overages
- ✓ Dept-funded GA stipends & tuition waivers
- ✓ Labor not covered by a base budget
- ✓ Revenue

The background features a large, faint, light gray graphic of a basketball, showing its characteristic lines and segments, centered behind the text.

Budget Adjustments  
and  
Expenditure Transfer Requests



## Which form should I use?

### Budget Adjustment Form

- Transfer funding to another dept as budget support
- DocuSign form at [budgeting.eku.edu/forms](http://budgeting.eku.edu/forms)

### Expenditure Transfer Form

- Move transactions allocated to an incorrect FOAPAL
- Attach forgotten activity codes to transactions
- Processed by Accounting (not Budgeting)
- Found at [accounts.eku.edu/accounting-financial-services-forms](http://accounts.eku.edu/accounting-financial-services-forms) or [forms.eku.edu](http://forms.eku.edu)

# Budget Adjustment Form - DocuSign



## Unrestricted Budget Adjustment Form

Description	Fiscal Year: Budget Adjustment Type: Description & Justification:															
	<b>FROM Organization</b> FUND      ORG      ACCOUNT      ACTIVITY *      LOCATION *      AMOUNT						<b>TO Organization</b> FUND      ORG      ACCOUNT      ACTIVITY *      LOCATION *      AMOUNT									
Budget Adjustment Detail																
* Activity & location codes are optional.						TOTAL		TOTAL								
Approvals	Submitted By:				Signature		Date		Dean/AVP/Other Approver (if required):				Signature		Date	
	Financial Manager of "FROM" Org:				Signature		Date		VP Approver (if required):				Signature		Date	
Budgeting	Director of Budgeting:				Signature		Date		Please contact the Office of Budgeting with questions. Email: <a href="mailto:budgeting@eku.edu">budgeting@eku.edu</a> Additional Contact Info: <a href="http://www.budgeting.eku.edu">www.budgeting.eku.edu</a>							
	Completed Form Received By:				Signature		Date									



# Questions?

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