

Job Aide: Amendment Process in BAT

This job aide will guide you through the steps to review the B-Prep process.

In the steps below you will:

- Verify that Preferences for Entity are set correctly
- Navigate the Task List and choose the B-Prep web form
- Validate data properly moved to Budget to B-Prep scenario and all the attrition/furlough accounts have been cleared in B-Prep Scenario
- Validate rounding results

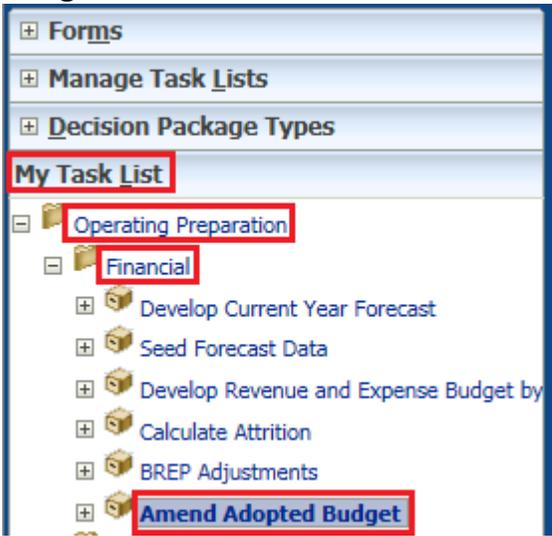
This job aid will guide you through the steps to review the Amendment process.

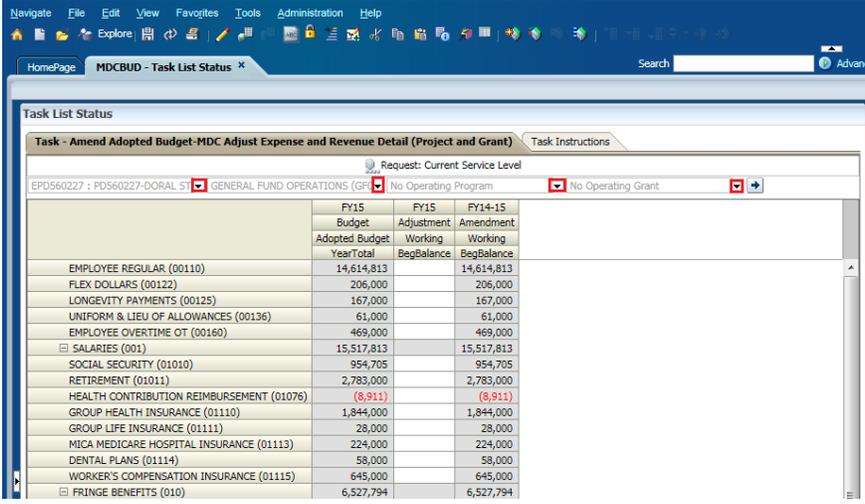
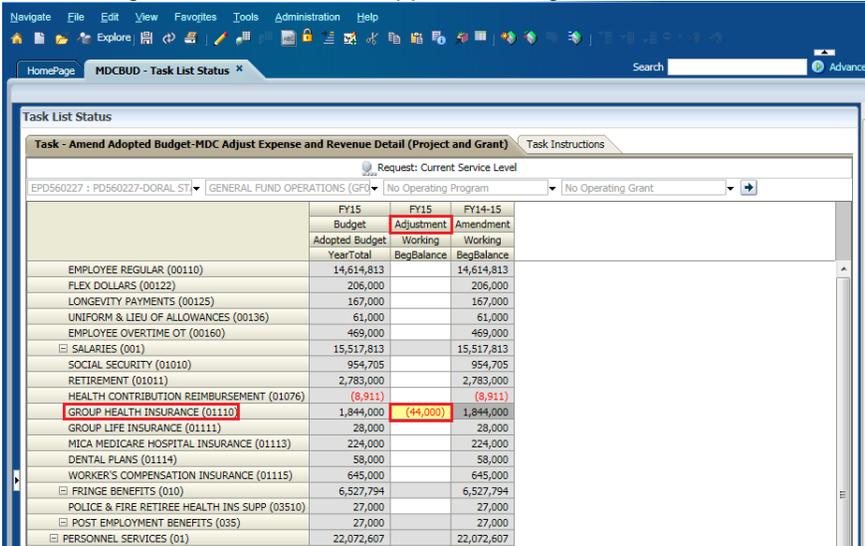
The BAT amendment process will be used to reflect any approved budget amendment during the current fiscal year. The BAT amendment process will prepare the budget transaction(s) that will be posted into the FAMIS system. It should not be used to correct or adjust the current year budget loads in FAMIS. If a department wants to correct their budget in FAMIS other than amendment related corrections, then the department will need to prepare a FAMIS budget transaction form, and submit it to the Finance department.

In the steps below you will:

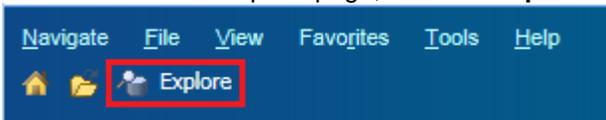
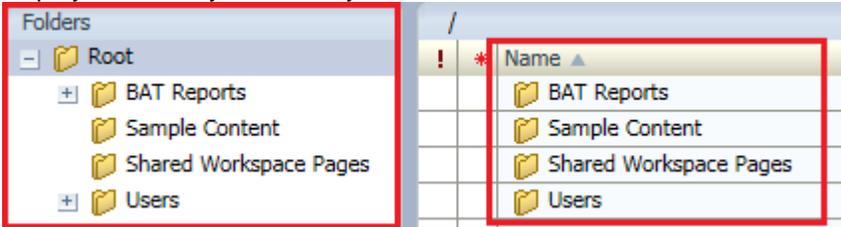
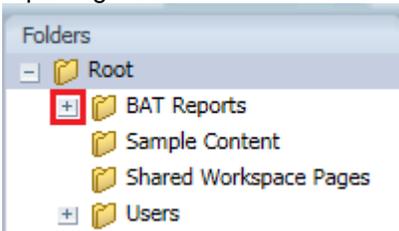
- Navigate the Task List and choose the Amendment web form
- Enter data properly in the Amendment scenario
- Validate data results

Job Aide BAT Amendment (A): Enter Adjusted Value in Amendment Form

Step	Action	Notes
1.	<p>On the left-hand navigation pane of the page, select My Task List > Operating Preparation > Financial > Amend Adopted Budget.</p> 	

Step	Action	Notes
2.	<p>At the top of the Amendment Form, find the Point of View (POV) display, and select the correct FAMIS financial member combination for Entity (FAMIS Index-code), Fund, Activity (FAMIS Project), and Project (FAMIS Grant). Click the drop-down arrow to view the available members.</p> 	<p>If users are unsure of the correct FAMIS financial member combination, then users can find it by going to FAMIS, and selecting the 5300 screen and entering the index-code that will display the combination.</p>
3.	<p>After setting the correct POV, locate the Adjustment column, and identify the Account(s) (FAMIS Sub-Object Code) where the current budget has been changed as a result of the approved Budget Amendment.</p> 	<p>In these Account(s), enter the amount needed to adjust the budget. For example if the current budget in the account is \$100,000, and the budget amendment reduce it to \$90,000, then you will need to enter -10,000</p>
4.	<p>Click the Save icon on the toolbar to submit data to the database.</p> 	<p>Repeat steps 2 and 3 until all Index-Codes have been adjusted for the Budget Amendment.</p>

Job Aide BAT Amendment (B): Validating Budget Amendment changes by using BAT Amendment Report

Step	Action	Notes
1.	<p>From the BAT Workspace page, click the Explore button on the toolbar.</p> 	
2.	<p>A list of folders display. These folders contain BAT reports and will display based on your security access.</p> 	
3.	<p>In the left pane, click the + next to the BAT reports folder to display reporting files.</p> 	

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4.	<p>Click the Operating Plan folder and the reports display the content window.</p>  <table border="1" data-bbox="370 323 1235 573"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Modified</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>BAT Amendment Appropriations Report</td> <td>Financial Reporti...</td> <td>3/23/15 1:16 PM</td> <td></td> </tr> <tr> <td>BAT Amendment Expense by Entity</td> <td>Financial Reporti...</td> <td>3/23/15 4:11 PM</td> <td></td> </tr> <tr> <td>BAT Amendment Revenue by Entity</td> <td>Financial Reporti...</td> <td>3/23/15 3:58 PM</td> <td></td> </tr> <tr> <td>BAT Appropriatins Report by Fund</td> <td>Financial Reporti...</td> <td>12/11/14 4:37 PM</td> <td></td> </tr> <tr> <td>BAT Appropriations Report</td> <td>Financial Reporti...</td> <td>1/29/15 4:12 PM</td> <td></td> </tr> <tr> <td>BAT Appropriations Report Naming Breakout</td> <td>Financial Reporti...</td> <td>12/11/14 4:37 PM</td> <td></td> </tr> <tr> <td>BAT BPREP Appropriations Report</td> <td>Financial Reporti...</td> <td>12/11/14 4:38 PM</td> <td></td> </tr> <tr> <td>BAT BPREP Expense by Entity</td> <td>Financial Reporti...</td> <td>3/23/15 4:14 PM</td> <td></td> </tr> <tr> <td>BAT BPREP Revenue by Entity</td> <td>Financial Reporti...</td> <td>12/11/14 4:38 PM</td> <td></td> </tr> </tbody> </table>	Name	Type	Modified	Description	BAT Amendment Appropriations Report	Financial Reporti...	3/23/15 1:16 PM		BAT Amendment Expense by Entity	Financial Reporti...	3/23/15 4:11 PM		BAT Amendment Revenue by Entity	Financial Reporti...	3/23/15 3:58 PM		BAT Appropriatins Report by Fund	Financial Reporti...	12/11/14 4:37 PM		BAT Appropriations Report	Financial Reporti...	1/29/15 4:12 PM		BAT Appropriations Report Naming Breakout	Financial Reporti...	12/11/14 4:37 PM		BAT BPREP Appropriations Report	Financial Reporti...	12/11/14 4:38 PM		BAT BPREP Expense by Entity	Financial Reporti...	3/23/15 4:14 PM		BAT BPREP Revenue by Entity	Financial Reporti...	12/11/14 4:38 PM		<p>The BAT Amendment Scenario has the following three Operating Plan reporting files.</p> <ol style="list-style-type: none"> BAT Amendment Appropriations Report <ul style="list-style-type: none"> Provides a summary of the budget information by Accounts (FAMIS Sub-Object Code), at the dimension level member selected by the user at the Entity (FAMIS Organization/Index-Code), Fund, Activity (FAMIS Project), and Project (FAMIS Grant) BAT Amendment Expense by Entity <ul style="list-style-type: none"> Provides a summary of the expense budget for all the lowest level members in an Entity BAT Amendment Revenue by Entity <ul style="list-style-type: none"> Provides a summary of the Revenue budget for all the lowest level members in an Entity
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5.	<p>Follow instructions in the BAT Training Guide Activity (section 31B, page 337) for steps on choosing and opening BAT Operating Plan Reports</p>																																									