

# Budget Allocation/Adjustment (BAA) Form

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## Carbondale Campus End User Instructions FORM - Budget Allocation/Adjustment

**Use:** To request a change/transfer in budget authority after the original budget has been posted to AIS.

**Access:** Access the form via the E-Forms web site (<http://eforms.siu.edu>). Adobe Reader 8.0 or higher must be installed on your computer.

**Instructions:** Complete the form using the following instructions: (Unless noted, all fields are **REQUIRED.**)

### Header Information Section:

Provide basic information regarding the budget allocation/adjustment.

*Fiscal Year* Indicate the fiscal year for which this adjustment is effective, using the YYYY format.

*Checkmark if transfer is P/S OTS, or vice versa*

If applicable, check here if funds are being transferred between personal services and OTS (other than salary) lines. If checked, a Funds Allocation Request (FAR) must accompany the Budget Allocation/Adjustment form.

*Applicable Fiscal Year*

Check Current, Projected or Both

Current: If the adjustment is for the current fiscal year only.

Projected: If the adjustment should be permanent and applied to the projected fiscal year and beyond.

Both: If the adjustment should be applied to both the current fiscal year and projected fiscal years. (Note: If the dollar amounts differ between these periods, two forms are required; one current and one projected.)

### Accounting Flexfield Information Section:

Provide the accounting flexfield distribution for each increase and decrease to the budget.

*Budget Purpose Title/Description*

Indicate the title of the Budget Purpose associated with the increase/decrease.

*Budget Purpose Number*

Enter the Budget Purpose associated with the increase/decrease.

*Object Number*

Indicate the object code value associated with the Budget Purpose. (Refer to <http://oit.siu.edu/ais/special-searches/object-code/> for a list of object codes.)

*Department Activity 1 (optional)*

If applicable, list the Department Activity 1 code. (Department Activity codes are 5-digit unique numbers assigned for specific use as defined by the using department. These codes are used at the discretion of the fiscal officer and department.)

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*Department Activity 2 (optional)*

If applicable, list the Department Activity 2 code. (See above note.)

*Current/Projected Year Amount Decrease/Increase*

In the appropriate column, list the amount of the allocation/adjustment.

*Justification*

Provide a reason for requesting the adjustment.

Signatures Information Section:

Obtain necessary signatures as required by your Vice Chancellor area.

**Special Notes:**

This form can only be processed electronically. Scanned copies are not allowed.

You must click the "Add BAA" button on the last page of the current BAA for another page to be added.

Only the fiscal officer and/or delegate may sign this form.

In the case of a transfer between units, both fiscal officers must approve this form.

**Routing:**

After filling out the form, e-mail the form to [budgetbaa@chanc.siu.edu](mailto:budgetbaa@chanc.siu.edu).

NOTE: Areas reporting to the Provost should e-mail the form to [pvcbaa@siu.edu](mailto:pvcbaa@siu.edu) for approval.