Q4. What is the budget error I am receiving, and how do I clear a budget error?

This tutorial will demonstrate how to determine what is the budget error in PeopleSoft, and how to clear it.

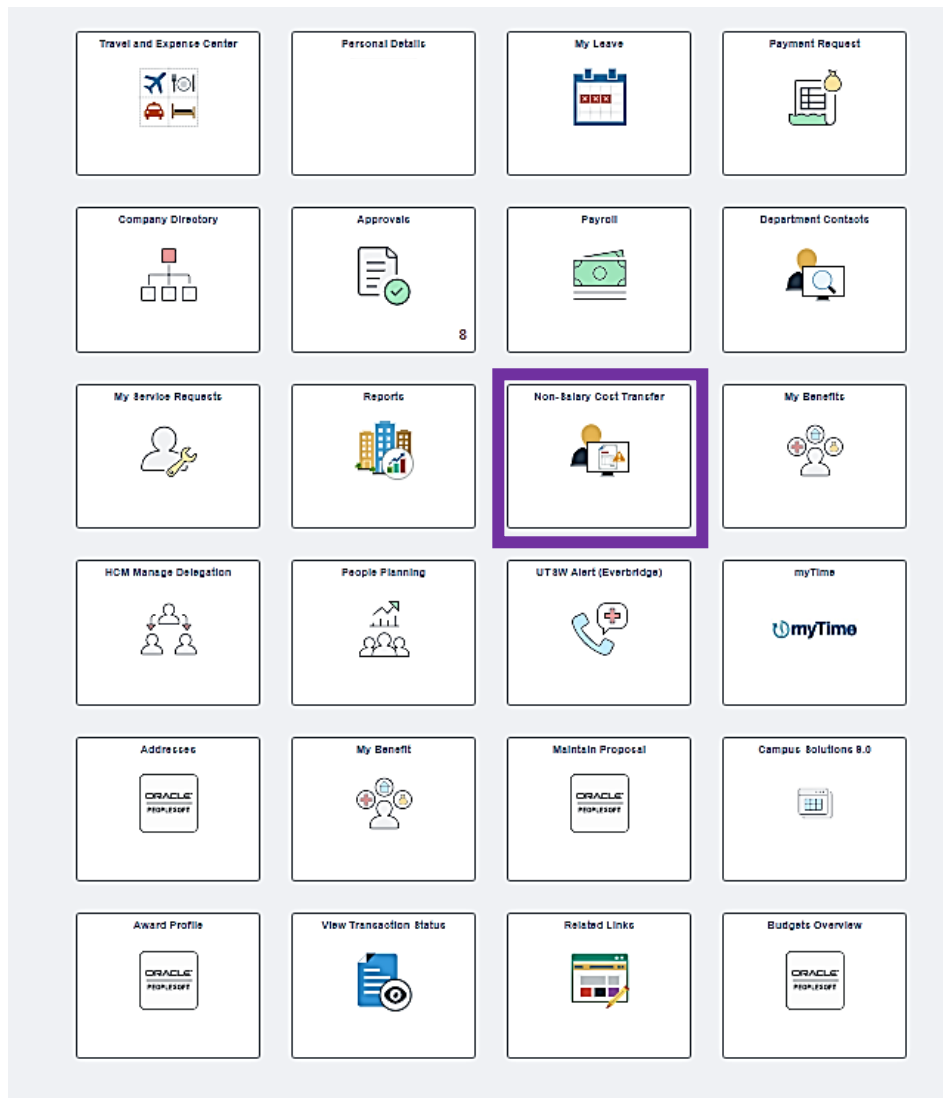From the **Tools** page on the UTSW intranet, click **PeopleSoft**.

Login with your UTSW **User ID** and **Password**, then click **Sign In**.

Click the option for **Non-Salary Cost Transfer**.

From the **NSCT Create Request** tab, select **Find an Existing Value**.
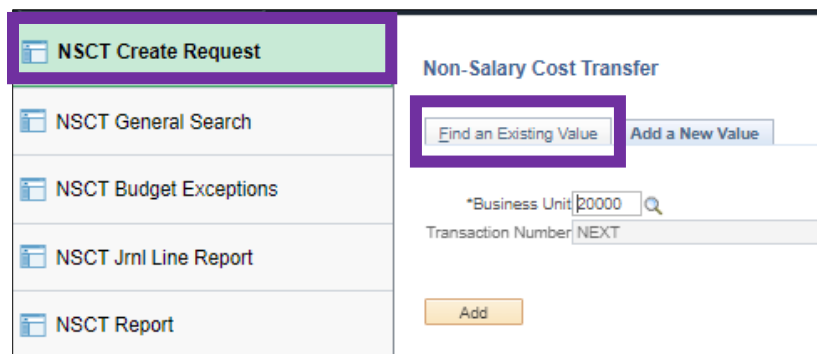
Enter the **Transaction Number**.

This takes you to the **NSCT Journal Lines** homepage. Click **Exceptions**.

Clicking **Exceptions** above will give an overall view of exceptions. Click the **Show All Columns** icon, which will show the **Chart of Account (COA)** along with **Budgets with Exceptions**. Next, copy the **Project** number.

Next, return to the home page. Click the **navigation icon** in the top right corner of your screen, then click the **menu icon**. Click through the following menu options: **Financial Supply Chain--> Grants --> Awards --> Award Profile.**
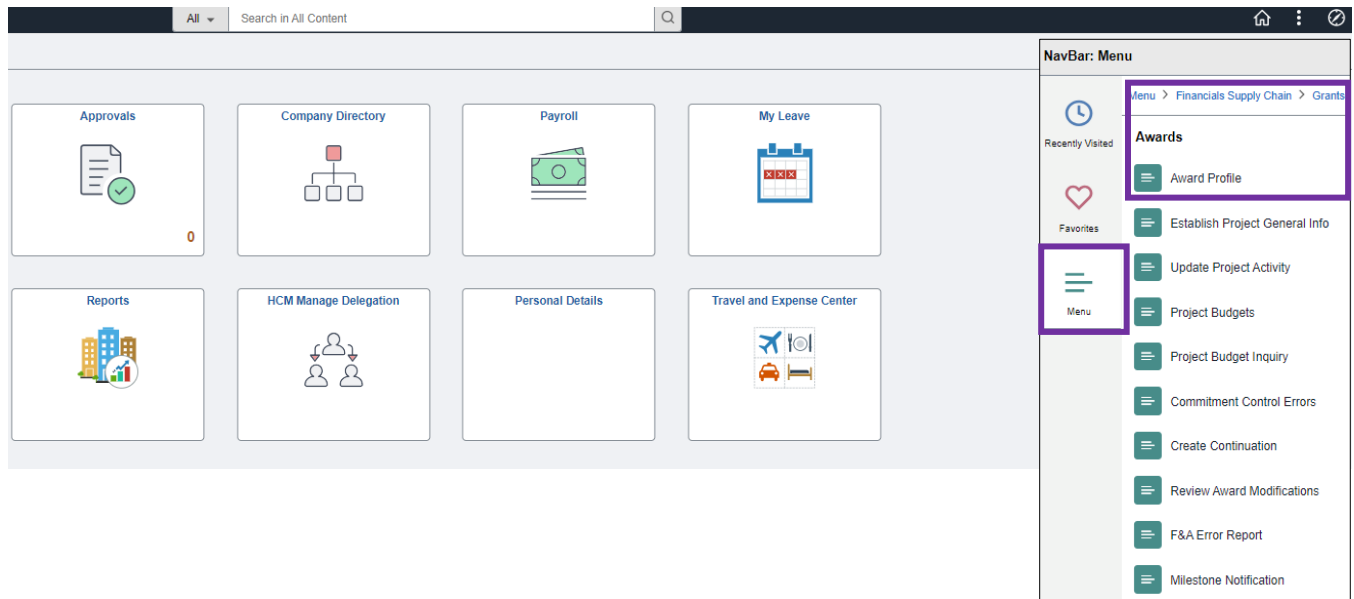
From the Award Profile page, the **Business Unit** should auto-fill to 20100. Type or paste your **Project** number into the blank field, then click **Search**.

From the Award Profile page, review the end date. When reviewing the budget date, if the date is in the past, contact the SPA Maintenance Team for override review. If SPA Maintenance determines the expense is not allowable, then the expense will need to be moved to another Chart of Accounts (COA). Please update the COA in the Non-Salary Cost Transfer (NSCT). If the date is incorrect, please work with the SPA Maintenance Team to update the end dates, allowing the form to pass budget check.

NOTE: If the date is in the past then the expense will need to be moved to another COA. Please update the COA in the NSCT.

BUDGET CHECKING – EXCEPTION (ERRORS) Examples

E1 Exceeds Budget Tolerance

This means: No Budget or insufficient budget for this Chart string

- ☐ Use a cost center that has available funds
- ☐ Cancel the document (requisition, voucher, travel authorization, etc.)
- ☐ Modify the amount or quantity ordered
- ☐ Request a budget adjustment (if applicable)

E2 No budget exists

- ☐ Someone with authority does a budget transfer
- ☐ Use a cost center that has available funds
- ☐ Cancel the document (requisition, voucher, travel authorization, etc.)

E3 Budget is Closed

This means: This budget is no longer available. This most likely will occur on Grants. Not overridable

- ☐ Change the distribution for the document
- ☐ Cancel the document

E6 Budget Date out of Bounds

Applicable to Grants and Plant budgets

- ☐ Will need to change Project charged
- ☐ Extends the dates for the Project
- ☐ Cancel the document (requisition, voucher, travel authorization, etc.)

E7 Spending Authority Over Budget

- ☐ Credit transaction caused spending authority (available budget balance) to exceed original budgeted amount.
- ☐ Until there is a transaction that it positive, this item cannot be processed. In this case it was a journal entry related to a test script but the net result was that it would have created increase spending authority for a cost center and that is not allowed. If they had expenses they were correcting that would have been okay, since then the budget would not have exceeded the original budgeted amount.
- ☐ Fix the cost center
- ☐ Delete the transaction

E28 Referenced Doc has been Finalized

This means: The transaction (such as a voucher) has a referenced document (such as a purchase order) that has already been fully liquidated.

- ☐ A new purchase order or purchase order line is required since this one has previously been marked as final and no money remains. Once it has been created, the voucher must reference the new line to be budget checked and paid.