

Budget Amendment Type	Workday Business Process	Description (Current State)	Scenario	Direction (If applicable)	Workflow Initiator(s)	Workflow Approver(s)	Workflow Notifications
Adjusted	Division	Intra-Institutional Reallocations. Does not require UWSA approval.	Moving budget amounts between departments or cost centers within the same division. Often used for reallocating funds for new priorities or correcting budget errors.	Intra-division (within a division)	Budget Amendment Initiator (Division) UW Budget Amendment Initiator (Campus) UW Budget Approver (Division) UW Budget Approver (UWSA) UW Budget Approver (Campus) UW	Budget Approver (Division) UW	Cost Center Manager Program Manager
Adjusted	Division	Intra-Institutional Reallocations. Does not require UWSA approval.	Transferring budget authority from one division to another. This might occur when a project or responsibility is shared across divisions, requiring adjustments to the budget.	Inter-division (between at least 2 divisions)	Budget Amendment Initiator (Division) UW Budget Amendment Initiator (Campus) UW Budget Approver (Division) UW Budget Approver (UWSA) UW Budget Approver (Campus) UW	Budget Approver (Division) UW *for all divisions with an entry on the amendment	Cost Center Manager Program Manager
Adjusted (One-Time)	Division	One-time Intra-Institutional Reallocations. Does not require UWSA approval.	A single, non-recurring adjustment within a division to address unexpected needs, such as a temporary project or a unique expense.	Intra-division (within a division)	Budget Amendment Initiator (Division) UW Budget Amendment Initiator (Campus) UW Budget Approver (Division) UW Budget Approver (UWSA) UW Budget Approver (Campus) UW	Budget Approver (Division) UW	Cost Center Manager Program Manager
Adjusted (One-Time)	Division	One-time Intra-Institutional Reallocations. Does not require UWSA approval.	A one-off budget transfer between divisions, usually to fund a special initiative or to cover a temporary financial shortfall.	Inter-division (between at least 2 divisions)	Budget Amendment Initiator (Division) UW Budget Amendment Initiator (Campus) UW Budget Approver (Division) UW Budget Approver (UWSA) UW Budget Approver (Campus) UW	Budget Approver (Division) UW *for all divisions with an entry on the amendment	Cost Center Manager Program Manager
Block Grant	Campus	Reallocations with a block grant within a business unit.	Allocating or redistributing funds that come from a block grant within a business unit, ensuring funds are used according to the grant's terms.		Budget Amendment Initiator (Campus) UW Budget Approver (Campus) UW Budget Approver (UWSA) UW	Budget Approver (Campus) UW	Budget Approver (Division) UW Cost Center Manager Program Manager
Carryover	Campus	Unencumbered nonfringe budget balance recorded in SFS at the end of the previous year. UWSA will notify institutions of their authorized carryover budget and process the entry to the institutional clearing account.	Carrying forward unspent budget from the previous fiscal year to be used in the current year, often for ongoing projects or obligations that span multiple years.		Budget Amendment Initiator (Campus) UW Budget Approver (Campus) UW	Budget Approver (Campus) UW	Budget Approver (Division) UW Cost Center Manager Program Manager
Carryover (Campus)	Campus	Unencumbered nonfringe budget balance recorded in SFS at the end of the previous year. UWSA will notify institutions of their authorized carryover budget and process the entry to the institutional clearing account. Used by campuses to distribute internal carryover funding.	Similar to general carryover, but specifically managed at the campus level. Used to distribute remaining funds from the previous year within the campus.		Budget Amendment Initiator (Campus) UW Budget Approver (Campus) UW	Budget Approver (Campus) UW	Budget Approver (Division) UW Cost Center Manager Program Manager
GPR Supplement	UWSA	UWSA Authorized GPR Budget Increases due to GPR Supplements. Supplements represent adjustments to authorized spending authority of an appropriation.	Adjusting budgets due to increases in General Purpose Revenue (GPR) as authorized by UWSA.		Budget Approver (UWSA) UW	Budget Approver (UWSA) UW	Program Manager
Lapse	UWSA	DOA Required Lapses - DOA mandated lapses of spending authority. UWSA will notify institution of lapse budget adjustment and a budget transfer will be entered and posted to the institutional clearing account in the SFS Budget Ledger.	Reducing budget authority due to state-mandated lapses in spending authority. Typically required by the Department of Administration (DOA) to reclaim unspent funds.		Budget Approver (UWSA) UW	Budget Approver (UWSA) UW	Budget Approver (Campus) UW Budget Approver (Division) UW Cost Center Manager Program Manager
Phase 2 Budget Load	UWSA		Loading the second phase of the budget, often involving additional funding or adjustments following initial budget approval.		Budget Approver (UWSA) UW	Budget Approver (UWSA) UW	Budget Approver (Division) UW Cost Center Manager Program Manager
PR/SEG Amendment	Campus	Increase/Decrease on PR Continuing, PR-F Continuing and SEG Continuing appropriations. PR Annual and SEG Annual require UWSA approval.	Making changes to budgets related to Program Revenue (PR) or Segregated Funds (SEG), usually for continuing appropriations that require adjustments.		Budget Amendment Initiator (Campus) UW Budget Approver (Campus) UW	Budget Approver (Campus) UW	Budget Approver (Campus) UW Budget Approver (Division) UW Cost Center Manager Program Manager
Prior Year Encumbrance	Campus	The PO encumbrance balance recorded in SFS and signed off on by institutions at the end of the prior year. In the current fiscal year these encumbrance amounts are considered to be "prior year encumbrances" and the budget must be reestablished in the SFS Budget Ledger. At the beginning of each new fiscal year, campuses have the primary responsibility for loading and reconciling the prior year encumbrances.	Re-establishing budget authority for commitments from the prior year that were not completed, ensuring funds are available to cover these obligations in the current year.		Budget Amendment Initiator (Campus) UW Budget Approver (Campus) UW	Budget Approver (Campus) UW	Budget Approver (Division) UW Cost Center Manager Program Manager
Systemwide Reallocation	UWSA	Budget reallocations authorized by UWSA.	Redistributing funds across the Universities of Wisconsin as authorized by UWSA, often to address system-wide priorities or budget shortfalls.		Budget Approver (UWSA) UW	Budget Approver (UWSA) UW	Budget Approver (Campus) UW Budget Approver (Division) UW Cost Center Manager Program Manager