

Iowa HFMA-Property Tax and Budget Preparation

Iowa Department of Management

April 12, 2023

Agenda

- Quick Property Tax Primer
- Department of Management's (DOM)
Role/County Auditor Role in Budget Process
- Budget Timelines
- Funds/Property Tax Levies and the Budget
Forms/Web System
- Budget Amendments

Property Tax Basics-Valuation

Property is valued

County or city assessor (or the Iowa Department of Revenue) estimates the value of all property-Assessed value

Assessment Limitation (Rollback) is applied

- More than 20 years ago, residential property values were rising quickly. To help cushion the impact of high inflation, the Legislature passed an assessment limitation law commonly called “rollback”.
- Increases in assessed values for residential and agricultural property are linked and subject to this assessment limitation formula. If the statewide increase in values of homes or farms exceeds 3% due to revaluation, their values are "rolled back" so that the total increase statewide is 3%. Additionally, neither class can be great than the other.
- Rollback on commercial, industrial and railroad property is set at 90%
- The rollback is applied on a class of property, not an individual property. This means that the statewide total taxable value can increase by only 3% due to revaluation.



Property Tax Basics-Assessment Limitation

The following classes of property are subject to taxation at less than 100% of value for 2022 values payable in FY2023/2024:

- Agricultural Property is to be taxed at a percentage of: 91.6430%.
- Residential Property is to be taxed at a percentage of: 54.6501%.
- Utility Property is to be taxed at a percentage of: 100.0000%



Property Tax Terminology

- 100% Value-100% assessed valuation of property, prior to any rollback
- Rollback-Assessment limitation set each year by the Department of Revenue for each class of property
- Taxable Value-valuation of property determined by applying the rollback, resulting in the value to which the tax rate is applied
- Levy Authority-Local governing body authorized to levy property tax.
- Consolidated Tax Rate-the tax rate for a taxing district that is arrived at by adding together the tax rates of all levy authorities for that taxing district (city, county, school, etc.).



Property Tax Basics-Rates

Property tax supports many different “levy authorities.”

- Cities
- Counties
- School districts
- Community colleges
- County agricultural extension districts
- Assessor offices
- County hospitals
- Various others

Levy authorities adopt a budget to request a certain amount of property tax dollars.



Property Tax Basics-Tax Rate Calculation

Tax rate is presented as dollars and cents per thousand dollars of taxable property valuation.

Taxable Valuation

1000 x Tax Rate = Property Tax Dollars (Levy)

\$50,000,000

1000 x \$2.35000 = \$117,500



Role of County Auditor

- County auditor submits taxable valuation figures used to compute tax rates
- Due to Department of Management and all levy authorities by January 1
- Once filed, available on DOM web site and populated into online budget forms.

Role of County Auditor

County auditor certifies local budgets

COUNTY AUDITOR'S CERTIFICATION

- The prescribed Notice of Public Hearing and Proposed Budget (Form 673) was lawfully published, with said publication being evidenced by verified and filed proof of publication.
- The budget hearing notice was published not less than 10 days, nor more than 20 days, prior to the budget hearing.
- The budget was certified on or before March 15.
- Correct valuation amounts were used to calculate the budget.
- Adopted property taxes in Column I do not exceed published amounts and do not exceed statutory maximums.
- Adopted expenditure amounts shown in Column C of the Adopted Budget Summary do not exceed published amounts.

County Auditor's Signature of Certification



Department of Management's Role

DOM provides the forms (including web-based), instructions, technical assistance for all local government budgets

The Board of Hospital Trustees of this County will conduct a public hearing on the proposed fiscal year budget as follows:
 Meeting Date: (entered upon publish) Meeting Time: (entered upon publish) Meeting Location:(entered upon publish)

At the public hearing any resident or taxpayer may present objections to, or arguments in favor of, any part of the proposed budget.This notice represents a summary of the supporting detail of receipts and expenditures on file with the secretary.

FUND	A Expenditure July 30, 2019 Actual	B Expenditure July 30, 2020 Re- estimated	C Expenditure July 30, 2021 Proposed	D Transfers Out	E Estimated Ending Fund Balance FY 2021	F Estimated Beginning Fund Balance FY 2021	G Estimated Other Receipts	H Transfers In	I Estimated Amount To Be Raised By Taxation
1. General	0	0	0	0	0	0	0	0	0
2. FICA				0	0	0	0	0	0
3. UNEMP				0	0	0	0	0	0



Department of Management's Role

DOM certifies the final property tax levies

- Tax rates and amounts are within statutory limits



Budget Timelines

- Publish notice of public hearing and proposed budget summary “not less than 10 nor more than 20 days” before the hearing
- Hold hearing; adopt budget
- Certify with County Auditor by March 15 (FY24 budgets-April 30 (observed May 1))
- DOM compiles local government budgets and certifies final tax rates back to County Auditor by June 15 and also provides consolidated tax rates
- County Auditor prepares tax rates for County Treasurer by July 1
- County Treasurer prepares tax statements for property owners, due September 30 and March 30 of each year



dom.iowa.gov/other-authorities

Tax Rates:

Other Authority Resources

Ag Extension Districts Rates

Assessors Rates

Community Colleges Rates

Community Colleges Valuations

County Hospitals Rates

TAX RATE DOCUMENTS

[County Hospital Property Tax Rates- FY2023](#)

[County Hospital Property Tax Rates- FY2022](#)

[County Hospital Property Tax Rates- FY2021](#)

IOWA DEPARTMENT OF MANAGEMENT												
CODE	HOSPITAL NAME	GENERAL	FICA	IPERS	EMERG	AMBULANCI	UNEMPL	DEBT SERVICE	TORT LIAB	TOTAL RATE	TOTAL DOLLARS LEVIED	PROPERTY TAX ONLY
01L001	ADAIR COUNTY MEMORIAL HOSPIT	0.27000	0.39389	0.66524	0.00000	0.27000	0.00000	0.00000	1.49321	3.09234	1,766,415	1,651,457
05L001	AUDUBON COUNTY HOSPITAL	0.27000	0.76609	1.09280	0.00000	0.00000	0.00000	0.00000	0.37111	2.50000	1,109,535	1,080,113
08L001	BOONE COUNTY HOSPITAL	0.27000	0.35867	0.35007	0.00000	0.00000	0.00000	0.00000	0.82549	1.80423	2,707,013	2,650,823
10L001	BUCHANAN PEOPLE'S MEMORIAL H	1.06150	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	1.06150	1,188,913	1,161,321

Hospital Property Tax Levies:	Purpose:	Restrictions:	Limitation per \$1000 valuation	Iowa Code Authorization:
General Fund Levy:Public Hospital	Improvement, maintenance and replacement of hospital	Population under 225,000 Population at or above 225,000	0.27000 2.05000	347.7
General Fund Levy:Revenue Hospital	Operation, maintenance and funded depreciation of hospital		1.08000	347A.3
FICA Levy and IPERS Levy	Employers share of FICA and IPERS	General Basic levy must be at max.	Amount Necessary	97B.9(3)
Emergency Levy	Emergency that cannot be financed from the General Fund	Requires State Appeal Board approval to levy and to spend	0.27000	24.6
Ambulance Levy	Ambulance service		0.27000	347.7
Debt Service	Principal & interest on debt	Some require voter approval, others only Board approval.	Amount Necessary	75
Tort Liability Levy	Liability insurance and tort claims and judgements		Amount Necessary	670



General Fund Levy

Public Hospital (40)-improvement, maintenance and replacement of hospital

Rate Limits

- Population under 225,000 = rate limit of 0.27000
- Population at or above 225,000 = rate limit of 2.05000

Revenue Hospital (4)-operation, maintenance and funded depreciation of hospital

Rate limit of 1.08

Memorial Hospital (1)=no property tax levy

FICA/IPERS Funds

- No rate limit; amount necessary and limited in purpose
- General Fund levy must be at maximum
- No expenditures shown in FICA/IPERS Funds; transfer to fund with salary expenditures

Emergency Levy

- For an emergency that cannot be financed through the General Fund, covered under Code of Iowa 24.6.
- Levy limit of \$0.27/\$1,000
- Requires approval of the State Appeal Board-special Form 699
- Must be filed with the county auditor by March 15 along with the adopted budget
- Funds must be transferred from Emergency Fund to be spent.

Unemployment Comp. Levy

- Pay the cost of unemployment benefits
- No rate limit; amount necessary and limited in purpose



Ambulance Levy

- Purchasing, leasing, equipping, maintaining and operating ambulance services.
- Only for when such services *are not otherwise available*.
- Rate limit = 0.27000

Tort Liability/Insurance Levy

- Pay the cost of tort liability, judgments or all insurance necessary and prudent to the operation of the hospital
- No rate limit; amount necessary and limited in purpose

Debt Service Levy

- Payment for qualified outstanding debt
- Form 703 in budget supplemental detail must be completed
- No rate limit; amount necessary and limited in purpose

Restricted Funds/Board Designated

- Many hospitals set aside funds from depreciation, etc., for building and improvements. Since all funds must be accounted for, and to distinguish these funds from restricted funds, a board designated fund may be established.
- Money may be transferred from this fund to other funds by board resolution.

Valuation Changes-SF 181

If a budget is already proposed or adopted, the budget will be held to the same tax dollars as published and, once the new lower valuations are filed, the budget form will recalculate a higher rate to arrive at the same tax dollar request.

-If the budget was not at a statutory rate maximum, no correction is needed, the system will automatically populate a new rate.

-Alternatively, the local government could choose to keep their rate the same as initially published, and either lower the tax asking upon budget submission, or ask DOM lower the tax asking, if the budget has been submitted.



Valuation Changes-SF 181

Again, if a budget is already proposed or adopted, the budget will be held to the same tax dollars as published and, once the new lower valuations are filed, the budget form will recalculate a higher rate to arrive at the same tax dollars request.

-If this causes a budget to have a levy rate that is now OVER their statutory maximum, the budget will now be in error.

DOM will correct township, assessor, hospital and ag extension budgets.



Valuation Changes-SF 181

If a levy authority has questions, direct them to DOM.

-Because the tax asking will remain the same as published or decrease, no additional budget notice publication or hearing will be required.

-When certifying budgets, please make sure you have the final revised version of the budget after any needed adjustments for your records.

As always, please ensure that adopted tax asking and expenditures are not higher than what was published, and rate/s are within statutory limits.



Valuation Changes

Levy authorities are held to the same *tax dollars* as what they published, not the same *tax rate*.

Township Tax Levy Name	Record Key	Total Dollars	Taxable Value with G&E Utilities	Tax Rate	Taxable Value without G&E Utilities	Property Taxes Levied	Replacement Tax
Canaan - Benefited Fire	44K0020	8,000	36,977,606	0.21635	36,537,490	7,905	95
FIRE DISTRICTS							

Code Sec.	Dollar Limit	Purpose	(A) Request with Utility Replacement	(B) Property Taxes Levied	(C) Rate
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Total Property Taxes	(27+39+40+41)	42	108,786	42	107,345	72	12.10337
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COUNTY AUDITOR - I certify the budget is in compliance with ALL the following:
 Budgets that **DO NOT** meet **ALL** the criteria below are not statutorily compliant & must be returned to the city for correction.



**BUSINESS PROPERTY TAX,
MULTIRESIDENTIAL CHANGES AND
COMMERCIAL & INDUSTRIAL PHASEOUT**

Changes in DOM Online Valuation System-Multiresidential

HF 418 passed in the 2021 legislative session eliminated the Multiresidential separate class of property beginning with January 1, 2022 assessments.

DOM Class “Multiresidential” will be changed back to a “Reserved” Column with the 2022 valuation filing. These properties are now reported within the “Residential” class.



District - 010001
 UNION TWP/ORIENT MACKSBURG SCH

Property Type: R
 City Ag: N
 City Exempt: N
 # Homesteads: 35
 TIF: N
 TIF Type: N

Frozen Base Year:
 Frozen Base Amount:
 Base District Code:
 Receiving TIF Type:
 Receiving Levy Authority Code:
 Consolidated Tax Rate: 26.37580

Class	100% Value	Taxable Value
Residential Property	7,154,110	3,872,532
Agricultural Land	22,214,460	19,780,014
Agricultural Buildings	263,710	234,812
Commercial Property	134,420	120,978
Industrial Property	0	0
Multiresidential	0	0
Reserved	0	0
Railroads	0	0
Utilities (Without Gas & Electric Utility Value)	3,087,774	3,087,774
Other	0	0
Gross Valuation (Without Gas & Electric Utility Value)	32,854,474	27,096,110
Less Military Tax Exemption	7,408	7,408
Total Net Valuation (Without Gas & Electric Utility Value)	32,847,066	27,088,702
Gas & Electric Utility Valuation	5,999,380	2,623,710
Open Spaces Land	0	0



Business Property Tax Replacement

Business Property Tax is no long a credit but a replacement for FY24. Budget with Commercial and Industrial Replacement.

Military Service/Mobile Home Replacement	22	0	0	0
Commercial and Industrial Replacement and Business Property Tax Replacement	23	0	0	0



Commercial & Industrial Phase Out

DOM has estimated future C&I replacements throughout the phase out.

<https://dom.iowa.gov/document/commercial-industrial-replacement-payments>





ONLINE BUDGET SYSTEM

Budget System for FY24

Forms look very similar to last year.

Log in access should transfer-let me know if someone needs access that does not have it.



Budget System for FY24

- If you use the tab key during data entry, it will move between the cells in which you can enter data. You can also use the arrow keys side to side and up and down.
- As you move within a page, the cell you are in will be highlighted and the row and column will show a green highlight.

REQUIREMENTS: EXPENDITURES, TRANSFERS OUT and ENDING FUND BALANCE		FYE June 30, 2020	FYE June 30, 2021	FYE June 30, 2022
Expenditures:				
Salaries	1	0	0	0

- Ending fund balances are produced by subtracting the sum of all expenditures from the sum of beginning balances and revenues.



DOM Web site: dom.iowa.gov/other-authorities

Official State of Iowa Website

Here is how you know

Agency



Iowa Department of Management

Promoting Excellence in Government

News Contact Us



Home

State Government ▾

Local Government ▾

Boards & Committees ▾

About DOM ▾



COUNTY RESOURCES

County Resources

County Budget Reports

This page provides information and resources for counties for submitting and amending their budgets, financial reports as required.

DOM Web site:


dom.iowa.gov/other-authorities

OTHER AUTHORITY BUDGET RESOURCES

[Local Budget, Valuation & AFR System](#)

 **Access System**

[Old Local Budget & Financial Report System](#)

 **Open System**





Local Government
Valuation & Finance

[Log In](#)

[Home](#)

Home

County	Status
77 - POLK COUNTY	Valuations Filed

Total records found: 1

County	Status
01 - ADAIR COUNTY	Valuations Not Filed
02 - ADAMS COUNTY	Valuations Not Filed
03 - ALLAMAKEE COUNTY	Valuations Not Filed

DOM Local Government Valuation and Finance

Enter your Account Id and Password and press sign in to continue.

Account ID:

Sign In

Password:

Account Details

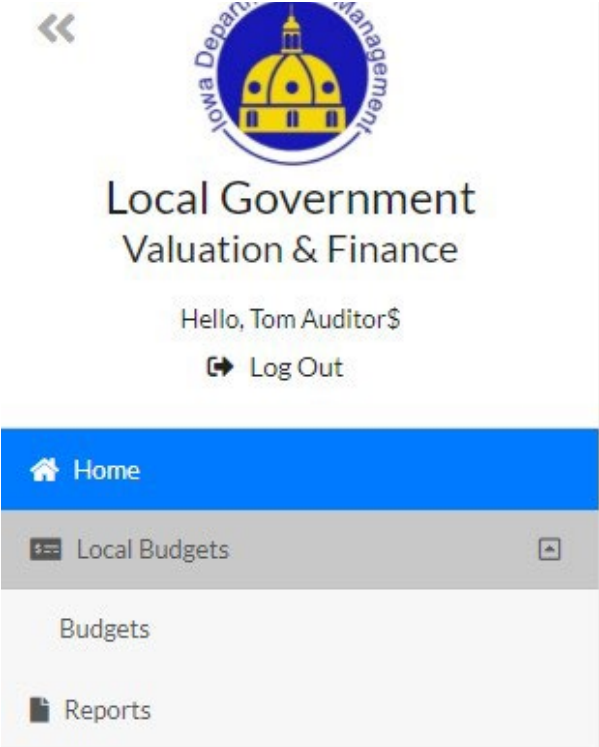
Help

[What is A&A?](#)
[Report Issue to State Service Desk](#)



To begin your budget:

Login using your Enterprise A&A an Account ID and password. The following screen shows the “Home” page.



The screenshot displays the user interface for the Local Government Valuation & Finance system. At the top left, there is a double-left arrow icon. The main header features the Iowa Department of Management logo, which consists of a yellow dome on a blue circular background with the text "Iowa Department of Management" around it. Below the logo, the text "Local Government Valuation & Finance" is displayed. A personalized greeting "Hello, Tom Auditor\$" is shown, followed by a "Log Out" button with a right-pointing arrow icon. A navigation sidebar is located at the bottom, with a blue bar for "Home" (indicated by a house icon) and a grey bar for "Local Budgets" (indicated by a list icon and a dropdown arrow). Below these, the menu items "Budgets" and "Reports" (with a document icon) are visible.



Budget Screen

+ Amend	Edit	2024	County Hospital	01L001	ADAIR COU...	New
+ Amend	Edit	2023	County Hospital	01L001	ADAIR COU...	Final
+ Amend	Edit	2022	County Hospital	01L001	ADAIR COU...	Final



Budget Tabs or Pages

[Public Hearing](#) [Adopted Budget Summary](#) [General Fund Unrestricted](#) [FICA Fund](#) [IPERS Fund](#) [Emergency Fund](#) [Ambulance Fund](#) [Unemployment Fund](#) [Debt Service](#) [TORT Liability](#) [Restricted Fund](#)
[Board Designated Fund](#) [Long Term Debt Schedule](#)

Once inside the budget, you will see tabs across the top representing the different funds and different pages that must be completed. Data entered on the Fund tabs and tax request entered on the Adopted Budget Summary tab will populate on the Public Hearing tab and the remainder of the Adopted Budget Summary tab.



Supplementary Details

Enter your revenue and expense detail on the supplemental detail sheets (different fund tabs). The data on the supplemental detail sheets is automatically totaled and brought forward to the Adopted Budget Summary and Hearing tabs



Fund Pages-Revenue and Expenditure Tabs

Revenue **Expenditures**

1. General Fund Unrestricted (Resources) - Sheet 1 of 2

RESOURCES: BEGINNING FUND BALANCE, TRANSFERS IN and RECEIPTS		FYE June 30, 2020	FYE June 30, 2021	FYE June 30, 2022
Beginning Fund Balance:				
Beginning Fund Balance	1	0	0	0
Other Receipts (DO NOT Include Credits Against Levied Taxes Here):				
Operating Income:	2	0	0	0

Revenue **Expenditures**

1. General Fund Unrestricted (Expenditures) - Sheet 2 of 2

REQUIREMENTS: EXPENDITURES, TRANSFERS OUT and ENDING FUND BALANCE		FYE June 30, 2020	FYE June 30, 2021	FYE June 30, 2022
Expenditures:				
Salaries	1	0	0	0
Employee Benefits	2	0	0	0
Professional Fees	3	0	0	0
Supplies	4	0	0	0



Valuations Populated

Once the 2022 valuations are filed in your county, the FY24 valuations figures need to complete the Adopted Budget Summary will be populated.

Until valuations are filed or if the county auditor “Unfiles” valuations, you will see the following notice on the top of your budget forms.

Notice: Your data may change, valuations are in an unfiled status. Contact your County Auditor with any questions



Adopted Budget Summary-Tax Request

PROPERTY TAX/UTILITY TAX REPLACEMENT EXCISE TAX COMPUTATION
 This section must be completed in order to compute the budget-year property taxes and utility excise tax estimate:

FUND	AW Utility Tax Replacement and Property Tax Dollars	BW Taxable Valuation With Gas & Electric Utilities	CW Tax Rate	DW Taxable Valuation Without Gas & Electric Utilities	EW Property Taxes Levied	FW Estimated Utility Tax Replacement Excise Taxes
1. General	0	26,267,433,759		25,662,416,040	0	
2. FICA	0	26,267,433,759		25,662,416,040	0	
3. IPERS	0	26,267,433,759		25,662,416,040	0	
4. Emergency	0	26,267,433,759		25,662,416,040	0	
5. Ambulance	0	26,267,433,759		25,662,416,040	0	
6. Unemployment Comp.	0	26,267,433,759		25,662,416,040	0	
7. Debt Service	0	29,143,348,639	0.00000	28,538,330,920	0	0
8. Tort Liability/Ins.	0	26,267,433,759		25,662,416,040	0	
9. Total	0		0.00000		0	0


Indicate the type of hospital and Code Authority

Area Hospital - Chapter 145A Public Hospital - Chapter 347 and 348 Revenue Hospital - Chapter 347A


To the County Auditor and Board of Supervisors of the above-named County, in the State of Iowa: At a lawful meeting of the above-named Board of Hospital Trustees, on the date indicated, the budget for fiscal year stated above was adopted as summarized. In addition, tax levies were voted on all taxable property of this County.

 _____


Board President's Signature of Certification

 _____

(Date)

 _____

Board Secretary's Signature of Certification

 _____

(Date)



If you want to include electronic/virtual meeting information on your notice, there is a text box on the bottom of the Public Hearing tab to add this information.

Virtual Meeting Information:

Join Zoom Meeting

<https://zoom.us/j/92737246486?pwd=NEVDWmV4OEtXYktJanhkejhLTzQ0dz09>

Meeting ID: 927 3724 6486

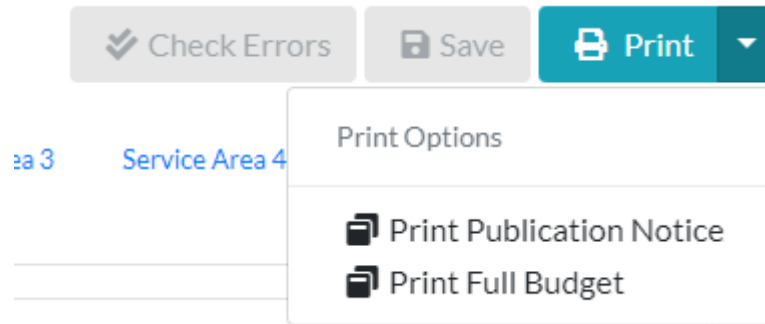


Budget Actions



Once in the budget you can “Check Errors”, “Save” and “Print” at any time.

Printing and Saving Budget



You can print the full budget at any time and now also print only the current page. Upon proposing your budget for publication, you can also print only the Publication Notice.

If in Google Chrome, you can select your local printer or “Save to PDF” as your destination. Thereby printing a hardcopy or choosing to save a PDF version to your machine.

WISCONSIN DEPARTMENT OF REVENUE
 State of Wisconsin, Department of Revenue
 Budget Year: 2017-2018
 Report Number: 10

The following table provides information on the proposed budget for the Department of Revenue for the fiscal year 2017-2018. It includes information on the proposed budget, the actual budget for the previous year, and the change in the budget. The information is presented in a table format with columns for the various budget categories and rows for each category.

Department	Position	FY 2017-2018 Proposed Budget	FY 2016-2017 Actual Budget	Change
Department of Revenue	Total	1,234,567,890	1,123,456,789	111,111,101
Statewide		1,123,456,789	1,012,345,678	111,111,111
Capital		111,111,101	111,111,111	(10)
Operating		1,123,456,789	1,012,345,678	111,111,111
Operating - Personnel		678,901,234	678,901,234	0
Operating - Materials and Supplies		123,456,789	123,456,789	0
Operating - Travel		234,567,890	234,567,890	0
Operating - Contract Services		234,567,890	234,567,890	0
Operating - Information Technology		123,456,789	123,456,789	0
Operating - Other		111,111,101	111,111,101	0

Print 9 sheets of paper

Destination IDOM Printer 02 - Rico ▼
 IDOM Printer 02 - Ricoh Aficio MP 505
 Adobe PDF
 Save as PDF
 Save to Google Drive
 See more...

Pages



Check Errors

You cannot publish your budget

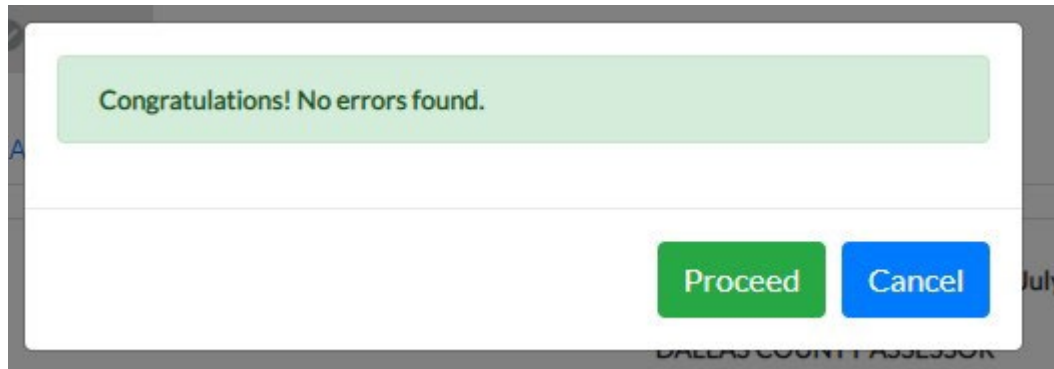


0 warning(s) and 1 error(s) were found in your budget.

General Levy Must Be At Maximum Before IPERS can Be Levied

Ok

Check Errors




When error free, you can Propose/Publish your budget to obtain the budget hearing notice to publish.

Propose/Publish Budget Notice

 Propose/Publish

You will get a screen to enter the date, time and place for the hearing notice for the regular budget hearing.

Propose/Publish Budget ×

Public Hearing Date(*)
11/23/2020 

Meeting Time (*)
09 : 00 AM

Meeting Location (*)
Board Room
Iowa State Extension Office
123 Main St
Town, IA 50000 OR
<https://uni.zoom.us/j/98297220132?tk=al2C9y->

Contact Person (*)
Jane Doe

Contact Phone (*)
555 555 1212 Ext.

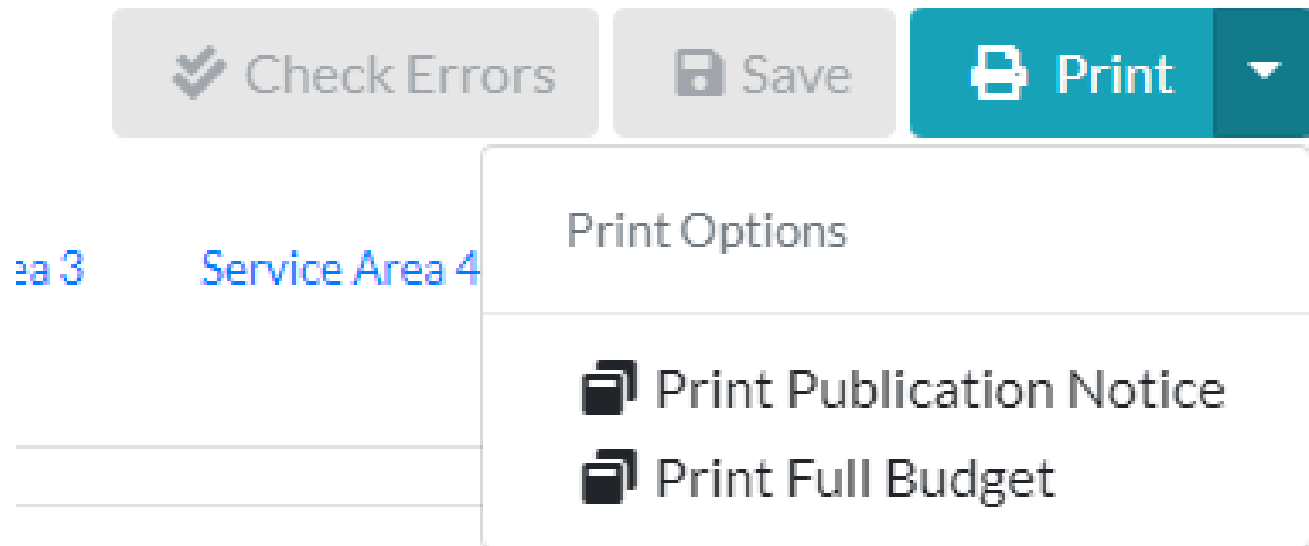
Cancel Propose



Propose/Publish Budget Notice

The system will generate a notice you can print or save to your system.

You can also access the public hearing notice at any time after proposing by going to Print at the top right.



Adopt the Budget

Following the public hearing, the Board may make any allowable revisions (decreasing tax asking or expenditures) to the budget by Return to Draft (which just opens the budget for edits) and making changes. The budget is again “Propose/Publish” (although not published in the newspaper again-leave the original publication date the same unless republishing for some reason) and now ready to “Adopt”.



Adopt the Budget

If no revisions are needed, you just click “Adopt” to proceed with the budget as currently presented. Enter your Adoption date and click “Adopt”.

Adoption Date *



Budget Documents Filed with Auditor

File the following documents with the county auditor:

- Proof of Publication for Budget Notice
- Signed Adopted budget and supplementary pages



Budget Protests

- Protesting a local government budget is covered under *Code of Iowa* Section 24.27. Persons affected by the proposed budget, expenditure or tax levy, or by any item thereof, may appeal the budget by filing a petition and appeal with the county auditor of the county in which the local government is located. Deadline is March 25.
- County Auditor forwards protest document to State Appeal Board

Budget Amendments

A budget amendment is required for any increase in the totals for funds.

Budget Amendment

The amendment must be effective before any of the expenditure amounts are exceeded. Budget amendments require the same notice and hearing procedures as required for the adoption of the original budget.

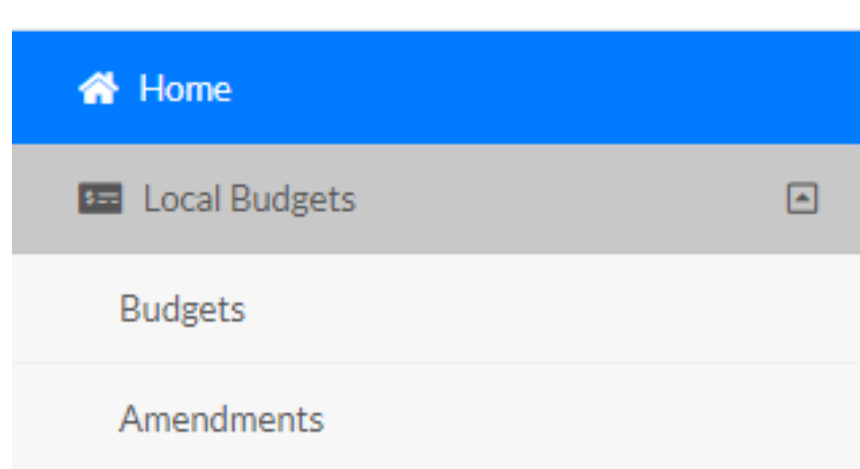
Budget amendments are subject to protest. An amendment of a budget after May 31, which is properly protested but without adequate time for hearing and decision on the protest by June 30, is void.

Budget Amendment Online Form

- The amendment form is found by logging into this same online system you use to adopt your budget and selecting “Amend” on your current year budget.
- A webinar on the amendment process is viewable on your Hospital Resources page at <https://dom.iowa.gov/county-hospital-boards>.
- You can also access instructions within the online amendment form itself.



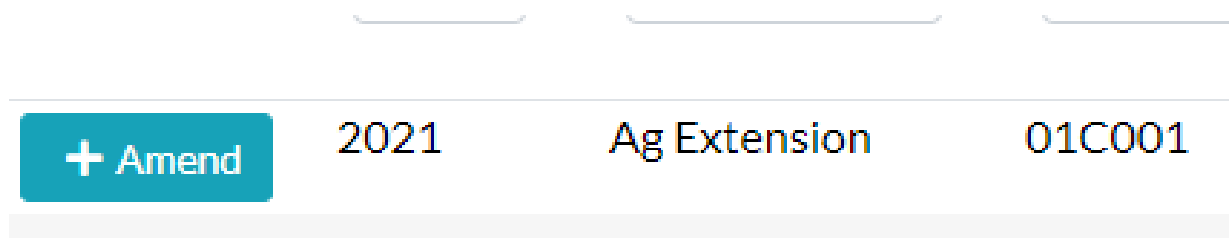
On the left you will see Budgets and Amendments. Once you start or complete an amendment, it will show up if you select “Amendments”. If this is the first time you need to amend your budget, you will need to select “Budgets”.



When you select Budgets, you will see your budget displayed on the main part of the screen.

You can begin the amendment process one of two ways:

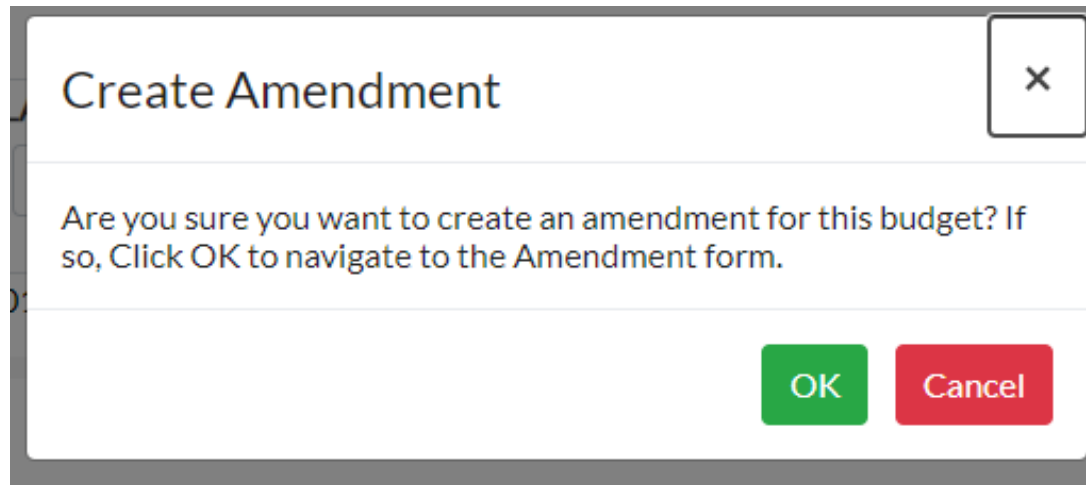
1) From this screen, you can select the “Amend” button to generate an amendment form.



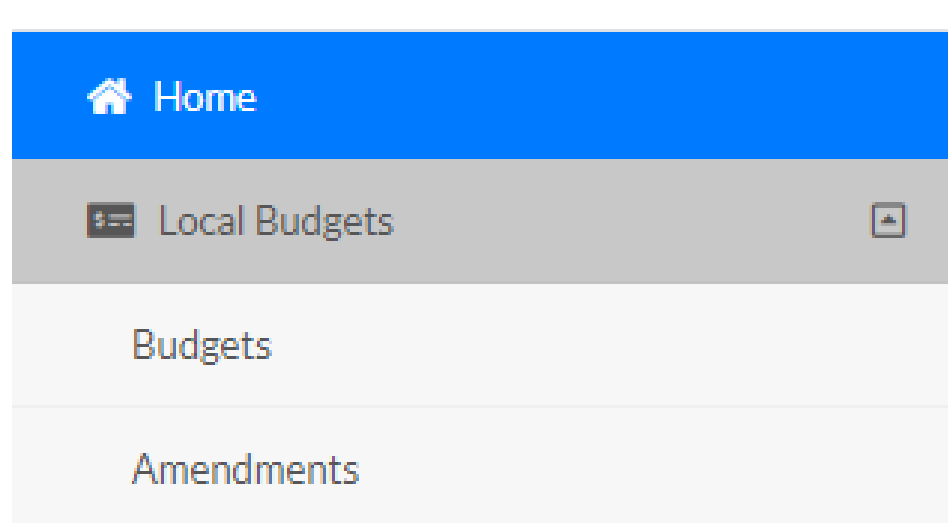
2) You can also enter the budget by selecting “Edit” and then choose “Amend” at the top.



Once clicking “Amend” you will see the following message:



Once you have started an amendment, it will display if you select “Amendments” on the left hand navigation.



The amendment form will generate for you and the system will direct you there automatically.

You enter data into **BLUE** cells.

The form will display your adopted budgeted expenditures (or amended budget if you had already completed an amendment this fiscal year) by fund in the **first** column.

The **second** column is where you will enter the amount/s you need to increase by fund.

The **third** column will sum for you and display your budgeted expenditures after amendment.

The **final** column is where you must enter the reason/s for the increase.

Total Budget as Certified or Last Amended	Amendment Increase	Total Budget After Current Amendment	Reason
396,608	1,000	397,608	Undertaking a new project.
0		0	
3,000		3,000	
399,608	1,000	400,608	

Be sure to “Save” progress and “Check Errors”.



Check Errors

 Save

Be aware that you must enter an explanation on the line beside any fund you are amending or the system will display an error.



Contact:

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