Budget Check Turned on for Financial Transactions

**Topic/Function:** Budget Check Turned on for many Financial Transactions

**Audience:**
- All Employees

**Description:**
Beginning on Monday, November 20, NSHE turned on budget check functionality in Workday. This means prior to completing your transaction, Workday verifies you have the funds budgeted or available in your accounts.

**Transactions**
The following transactions will include a step for automatic budget check.

- Spend Authorizations
- Expense Reports
- Purchase Requisitions
- Purchase Order Issue

The following transactions will not include an automatic budget check. You are responsible for verifying you have funds budgeted or available for these transactions prior to initiating them.

- Personnel transactions (create positions, hiring, job changes, etc.)
- Purchasing Card Transactions
- Payroll Accounting Adjustments
- Supplier Invoice Requests
- Create Journal

**What to do when Budget Check Fails**
When a transaction is submitted with an inadequate budget, the initiator will receive a Review Budget Check message in their inbox. Below are the options when there are insufficient funds.

Your options are

1. Review your transaction and check for incorrect worktag or spend category entry. Update and resubmit.
2. Modify the Transaction by the amount or accounts you are charging to fit into your budget constraints.

If you have any questions, submit a [Workday Help Desk Ticket](#) or contact the Workday Help Desk at 775-784-6086.
3. Work with your Cost Center Budget Specialist to review and, if appropriate, update your account budgets

4. Employees should NOT Submit a Budget Override without first getting approval from their Fiscal Officer or Budget Coordinator. This request for budget override goes directly to the Controller’s Office – there is no interim management review. A budget override should be a rare occurrence and only submitted after consultation and with financial approval. Where possible, a plan to correct the temporary budget override should be attached to the transaction.

**Note:** When you receive a Budget Fail Notification, you will have the option to “View” the budget. Currently, that report is causing the system to freeze. **Do not click the View button.** The project team is actively working on the issue and will let you know when it is resolved.

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