

## Budget Office Ticket Requests

1. The Budget Office has created several request types in Workday to support departments' financial needs, replacing the use of Team Dynamix. To submit a request, search the Workday search bar for any of the following:

- Budget Amendment Questions
- Budget Office Carryforward SmartTag Request
- Budget Office SmartTag Inactivation and Reactivation
- Budget Office New SmartTag Request Form
- Budget Office SmartTag Title and Cost Center Change

The screenshot shows a 'Create Request' modal window. The 'Request Type' field is labeled with a red asterisk and contains the text 'Bud'. A dropdown menu is open, displaying 'Search Results (5)'. The first result, 'Budget Office Budget Amendment Questions', is selected and highlighted in blue. Below it are four other options, each with a radio button: 'Budget Office Carryforward SmartTag Request', 'Budget Office SmartTag Inactivation and Reactivation', 'Budget Office New SmartTag Request Form', and 'Budget Office SmartTag Title and Cost Center Change'. At the bottom right of the modal are 'Cancel' and 'OK' buttons.

2. You will be prompted to answer questions about the SmartTag, including its cost center, purpose, and fund type.
3. Once submitted, the request will be submitted to the Budget Office for review and other departments accordingly. After it is completed, the initiator will receive both a Workday notification and an email indicating whether the request was approved or denied. One can always find its request in the archive inbox on Workday.
4. These requests are not intended for creating a new FAUF gift or Sponsored TAGs. Please contact the Foundation and Sponsored departments for guidance.

Examples:

1. Budget Office Budget Amendment Questions:

**Budget Office Budget Amendment Questions** 01/10/21

Budget Office Budget Amendment Questions

Describe the Request \*

Summary of request/issue  
(Required)

Attachment  

Drop files here  
or

2. Budget Office Carryforward SmartTag Request

**Budget Office Carryforward SmartTag Request** 01/10/21

Budget office carryforward form for new smarttag requests

Describe the Request \*

[Please view Job Aid before completing](#)

Brief Explanation of the Request  
(Required)

Carryforward Grouping  
(Required)  

select one ▼

Project Description  
(Required)

### 3. Budget Office SmartTag Inactivation and Reactivation:

**Budget Office SmartTag Inactivation and Reactivation** 

REQUEST - Budget Office SmartTag Inactivation and Reactivation

Describe the Request \*

Prior to reaching out to any of the departments listed below, kindly make sure to refer to the "SmartTag Inactivation Ticket Request Job Aid", which is available [here](#).

**For Fund types:**  
**Carryforward and Educational & General/ GTAIDS:**

1. To clear out the budget to \$0 – Contact Budget Office
2. To clear out actual expenses to \$0 – Contact General Accounting
3. To clear out Commitments and Obligations to \$0 – Contact Procurement
4. To clear out Positions, Members, Staffing, and Unavailable to Fill data attached to the SmartTag – Contact Human Resources

**For all other fund types:**

1. To clear out the budget to \$0 – Contact Budget Office
2. To clear out all actual balances, including assets, liabilities, and fund balances, to \$0 – Contact General Accounting.
3. To clear out the fund balance/Net Position to \$0 – Contact General Accounting
4. To clear out Commitments and Obligations to \$0 – Contact Procurement
5. To clear out Positions, Members, Staffing, and Unavailable to Fill data attached to the SmartTag – Contact Human Resources

**The SmartTag will not be inactivated unless all the activities listed above for your fund type have been completed.**

Is this an inactivation or reactivation  
(Required)

☐ Inactivation

☐ Reactivation

### 4. Budget Office New SmartTag Request

**Budget Office New SmartTag Request Form** 

Budget Office request framework to intake new smarttag requests.

Describe the Request \*

[Please view Job Aid before completing](#)

What is the new SmartTag title ?  
(Required)

Please choose fund type for program code  
(Required)

Are you requesting a new Fund ID ?  
(Required)

☐ Yes

☐ No

## 5. Budget Office SmartTag Title and Cost Center Change

### Budget Office SmartTag Title and Cost Center Change



REQUEST - Budget Office SmartTag Title and Cost Center Change

Describe the Request \*

Use this service if you want to change the title of an existing SmartTag or cost center.

Provide the number of the SmartTag to be changed  
(Required)

Select Funding Source  
(Required)

Provide the number and description of the existing Cost Center  
(Required)