## Budget Exceptions

When budget checking results in an error, the Budget Exception will identify what caused the error. Some errors prevent transactions from progressing, while others are just a warning. PantherSoft Financials sends automated email notifications to the Budget Approver(s) responsible for clearing the budget exception for each occurrence. The various types of Budget Exceptions can be found in the Budgetary Controls Guide available on the Office of Financial Planning webpage.

Use the grid and steps below, to identify the causes of these exceptions and how to resolve them.

<table>
<thead>
<tr>
<th>Budget Exception</th>
<th>What it Means</th>
<th>What to do</th>
</tr>
</thead>
</table>
| **Exceeds Control Budget** | Indicates there is insufficient budget for the transaction. **No further progression is possible until the error is resolved.** | - Run Budget Overview to confirm available budget.  
- Examine committed funds to identify transactions that may be stuck or should be closed/cancelled.  
- Amend money into the budget.  
- Charge the expense(s) to a different budget where money is available.  
**NOTE:** Once a correction is made, budget check the transaction again. |
| **No Budget Exists** | Indicates that a budget has not been established for the ChartField combination entered on the transaction. **No further progression is possible until the error is resolved.** | - Verify ChartFields were entered correctly. Send transaction back to submitter for ChartField corrections, if necessary.  
- Work with Budget Manager if ChartFields were correctly entered. |
| **Exceeds Non-Control Budget (Warning Message)** | Indicates there is insufficient budget for the transaction, but the budget is tracked and not controlled. Progression is still possible. | No intervention or action is needed. |
| **Budget Date Out of Bounds** | Activity Numbers: Indicates that the transaction is attempting to budget check in a budget period outside of the current fiscal year. Projects: Indicates the budget date on the transaction is not within the effective dates of the project. | Contact Financial Systems and Support Services (FSSS) at 7-7200 or (305)348-7200 or email controller@fiu.edu.  
Research Projects: Contact Office of Research and Economic Development at 305-348-2494 or email research@fiu.edu. |
| **Exceeds Budget Tolerance** | Indicates there is insufficient budget for the transaction. **No further progression is possible until the error is resolved.** | - Run Budget Overview to confirm available budget.  
- Examine committed funds to identify transactions that may be stuck or should be cancelled.  
- Amend money into the budget.  
- Charge the expense(s) to a different budget where money is available.  
**NOTE:** Once a correction is made, budget check the transaction again. |
| **Translation Tree Error (Requisitions Only)** | Indicates that a myFiUmarket Item Category Code does not exist on the appropriate tree to translate it to an Expense Account. | Expense Account will default to ‘000000’. No intervention or action is needed. Purchasing resolves these daily.  
**NOTE:** Once a correction is made, budget checking is run again. |