

# Iowa Department of Education

## AMENDING A TITLE I BUDGET

**Note: When amending to reflect your actual expenditures, please wait for the amendment to be approved by the State Title I office before reporting Title I expenditures as final.**

For technical assistance on amending a Title I budget, contact the Title I Consultant for your particular Area Education Agency (AEA).

For various reasons, it may become necessary for a local education agency to amend an approved Title I budget during the project year. You need to file an amendment if:

- The total expenditures are less than the approved budget amount.
- The total spent in an expenditure category exceeds the budgeted amount by more than 10 percent.
- There are reimbursable Title I expenditures not included in the approved budget.

To complete this process, the LEA must submit an electronic amendment to the applicable approved budget of the Title I application. **Note:** If the district needs to file an amendment, please follow through with that process before reporting the Title I expenditures for the program.

The option for amending the Title I budget becomes available on the electronic budget form once the State Title I office approves the LEA's general, general carryover, migrant, local delinquent or SINA budget. At that time, the **Add Amendment** button will appear on the budget form.

**Note:** Prior to beginning the amendment process, the user will want to have a hard copy of the original budget for Title I files and reference. The following is the electronic amendment process:

1. From the applicable budget form, click the **Add Amendment** button. The approved budget figures will be displayed on the budget form.
2. Change the figures that need to be changed by clicking on the appropriate place in the budget and entering the new figure.

✓ **TIP: the category total will change automatically for the specific budget item being amended. NEVER try to enter a figure in a category total.**

3. Do not make changes to those figures that remain the same as they appeared on the original approved budget. The amended budget must reflect the total expenditures you plan to have for the amended project budget. (**Note:** if the user is amending the general budget and you also have carryover funds, the amended general budget total plus the approved general carryover budget total should equal the expected total Title I reimbursement for the current project year. For example, if the district has an approved general budget of \$110,000 and an approved general carryover budget of \$25,000, but the total Title I expenditures for the year is only \$125,000; the user should amend the general budget to \$100,000.)
4. Click the **Save** button to save the new amended budget. Click the **Finish** button to return to the Title I Home screen.
5. The amendment will be submitted to the state Title I office only after you click the **Submit** button.

Once the user has clicked the **Submit** button the SEA will be alerted that the LEA has completed the amendment process. The amended budget will go through the approval process at the state Title I office. As budget amendments are approved, necessary adjustments in payments will automatically be made. If an amendment has been made to the general budget that affects carryover for the coming year, the carryover will be reflected on the Payment Status form in the difference between the allocation amount and the approved amount; and will be reflected on the next year's allocation notification letter and the LEA's Title I budget form.

You are reminded that, by law, a district with an allocation of \$50,000 or more may only carry over 15% of the allocation. Once every three years the SEA is allowed to grant a waiver of the excess carryover. A district must submit a Waiver of Excess Carryover to apply to use the excess funds.

**Note:** The original budget will be available following an amendment process by using the lookup box at the top of the budget table.

✓ **TIP: Any current year general budget funds approved but not spent are only available as carryover funds in the next school year through the completion of an amendment that reduces the unspent funds out of the current year approved general budget.**

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