

Helpful Hints for PO: Clearing Budget Errors

When a purchase order (PO) fails to pass budget check it falls into budget error. When a PO is in budget error, it cannot be dispatched, closed, or canceled. It is each agency's responsibility to correct POs in budget error.

In order to resolve budget errors, first determine what is causing the error. The two most common types of budget errors are:

- **No Budget Exists** - ChartFields used are not set up as a budget
- **Exceeds Budget Tolerance** - There are not enough funds to cover this purchase order

Once you've determined the type of error, you must fix the error. In either case, first check the distribution lines to ensure the ChartField data was entered accurately. If a ChartField is found to be entered incorrectly, use the **Maintain Distributions** page to correct it. If the ChartField data is correct, follow the directions below according to the error type:

No Budget Exists

- *If the error is at the allotment level:* Follow agency procedures to contact OBM Budget Analyst to create a Budget.
- *If the error is at the agency level:* Contact Agency Budget Analyst to create a budget.

Exceeds Budget Tolerance

- *If the error is at the allotment level:* Follow agency procedures to contact budget analyst.
- *If the error is at the agency level:* Contact Agency Budget Analyst.

If all else fails and the error cannot be cleared with the help of a budget analyst, contact Ohio Shared Services Center at 877-644-6771 for assistance to cancel the PO.