FGIBAVL – Checking Available Balance by Account/Pool Account (Admin Pages)

General Information

In order to manage budgets, departments must review budget balances on a regular basis.

As a supplement to the **FGIBDST: Organizational Budget Status Handout**, this information is provided so that you can check available budget balances for pool accounts more easily. The information contained in this document will help you determine what you have available to spend.

Resource: Finance Program Guide https://bf.memphis.edu/spectrum/

How to Check Your Available Balance:

Actions and Steps	Helpful Tips & Tricks
1. Access the **Budget Availability Status Form**. This form will show you available budget balances by organizational budget.	Type **FGIBAVL** in the **Search Block** field on the **Home Screen** and press **Enter**.
2. In the key information area, the following information displays - enter the **Chart**, **FY** and **Index Number** you wish to review: • **Chart**: U • **Fiscal Year**: defaults to current fiscal year *[may be edited]* • **Index**: enter Index • **Organization**: enter the Org Code • **Fund**: enter Fund • **Program:** enter Prog • **Account:** enter a valid ***expenditure*** object code ***(REQUIRED!)*** Use the **Go Button** or **Alt + PgDn or Down Arrow** to load the budget information for the specific budget in the information area displayed at the bottom of the form. The information related to the Org code selected is shown. ▯ **Control Keys**: will fill in after information is loaded.	If you wish to look at your budget balances from the first expenditure code, enter **61103** in the **Account** field. Remember that salaries will display by line item, but travel, operating and capital expenses will show pool balances. You cannot view details from this form. In the *Auto Hint/Status Line* at the bottom of the page, the number of line items in the budget is displayed (i.e., 1) **Go Button** or **Alt + PgDn** or **Down Arrow**.  
3. The following information is displayed for each account: **Account**: code for account or pool account • **Title:** of account or pool account • **Adjusted Budget**: Current operating expense budget for the specific *labor* categories (administrative, support clerical, support administrative, etc.) and pool accounts for *travel*, *operating* and *capital* expenditures.	Please keep in mind that this form is updated *as data is entered* and will display both *approved* and *unapproved* transactions. Detailed expenditure data can be obtained through the **Organization Budget Status Form [FGIBDST]** which is updated ***after*** posting and approval processes are completed.

This is a **total** of the original budget load and all budget adjustments. • **YTD Activity**: Expenditures posted against the specific account or pool account for the current year-to-date. • **Commitments**: total of your encumbrances. • **Available Balance**: Net balance (adjusted budget minus YTD activity and commitments). • **Total**: provides your net totals. • **Pending Documents**: If checkbox checked, a budget adjustment, purchase order or transfer voucher may exist.	If the Pending Documents checkbox is checked for that line item, **highlight** that line item and go to **Related Menu Button** > **Pending Documents [FGITINP**]. This will show current information about these pending documents.