

BUD-20 View Budgets

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to view budget entries and budget balances in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers how to view budgets entries and budget balances in the NCFS which will enable you to review budget entries, budgetary control balances (certified and authorized), and budgetary control balances (funds-checking control budgets).

Review Budgetary Entries

To review budgetary entries in NCFS, please follow the steps below. There are 6 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Budgetary Control** tab and then click the **Budgetary Control** app.

Image



Step 3. On the **Budgetary Control Dashboard**, click the **Tasks** icon and click **Review Budget Entries**.

Image

Budgetary Control Dashboard

Budget Monitor

View **Detach** Budget Account Group 016040 * Budget Period Jun-23 * Balance

Agency	Budget Fund	Budget (USD)	Consumption (USD)	
		Total	Total	

Failures Requiring Attention

Failed Transactions (0) Cash Budget Status Exceptions (0)

These transactions failed during reservation of funds and didn't update budgetary control balances. After you review budgetary control reprocessing.

View **Reprocess** **Detach**

Transaction Transaction Type Failures Ledger

Budgets

- [Manage Control Budgets](#)
- [Enter Budgets in Spreadsheet](#)
- [Review Budget Entries](#)
- [Review Budgetary Control Balances](#)
- [Review Budgetary Control Transactions](#)

Period Close

- [Budget Period Statuses](#)
- [Manage Encumbrance Carry Forward Rules](#)
- [Carry Forward Funds Available](#)
- [Carry Forward Purchase Order Budgetary Control Balances](#)

Step 4. On the **Review Budget Entries** page, select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

In this example we choose **NC Authorized** for **Control Budget**, **Jul-22** for **From Budget Period**, and **To Budget Period**.

Click the appropriate **Budget Entry Name** link.

Note: To obtain the results for all the budgets, **Saved Search** should always be set to **All Budget Entries**.

Image

Review Budget Entries

[Done](#)

Search

[Advanced](#)[Saved Search](#)[All Budget Entries](#) ▾

* Required

* Control Budget * From Budget Period * To Budget Period Budget Entry Name [Search](#)[Reset](#)[Save...](#)View ▾    Wrap

	m/d/yyyy						
Budget Entry Date	Budget Entry Name	Budget Entry Classification	Source Amount (USD)	Amount Changed (USD)	Budget Amounts Entered As	Justification	
2/8/23	CONV FY20212...	Initial budget	2,142,181,168.00	-2,142,181,168.00	New budget or r...		
2/8/23	CONV FY20212...	Initial budget	2,249,769,135.00	-2,249,769,135.00	New budget or r...		
2/8/23	CONV FY20212...	Initial budget	14,236,382.00	-14,236,382.00	New budget or r...		

Step 5. On the **Budget Entry Details** page, review the budget entry details.

Image

Budget Entry Details: CONV FY202123 TYPE NON-C...



Control Budget
NC Authorized

Budget Entry Date
2/8/23

Budget Currency
USD

Budget Amounts Entered As
New budget or replacement of current budget

Additional Information

View
Detach
Wrap
Budget Period
All

Budget Account	Budget Period	Source Amount	Amount Changed	Comment	Revision Type	Revision Number	Budget Code
5000-105303-4810C	Jul-22	187,069.00	-187,069.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105316-4810C	Jul-22	542,742.00	-542,742.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-4810C	Jul-22	14,584.00	-14,584.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-4810C	Jul-22	23,578.00	-23,578.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-4810C	Jul-22	32,415.00	-440,395.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105319-4810C	Jul-22	4,919.00	-507,173.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105316-4810C	Jul-22	1,753,375.00	-2,327,899.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105305-4810C	Jul-22	307,561.00	-307,561.00	NCAS 5001-438...	NON-CI Authorized Budget		16800

Step 6. Click the **Done** button. This will redirect you to the **Review Budget Entries** page.

Image

Budget Entry Details: CONV FY202123 TYPE NON-C...



Control Budget NC Authorized

Budget Currency USD

Budget Entry Date 2/8/23

Budget Amounts Entered As New budget or replacement of current budget

Additional Information

View Detach Wrap Budget Period All

Budget Account	Budget Period	Source Amount	Amount Changed	Comment	Revision Type	Revision Number	Budget Code
5000-105303-48100	Jul-22	187,069.00	-187,069.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105316-48100	Jul-22	542,742.00	-542,742.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-48100	Jul-22	14,584.00	-14,584.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-48100	Jul-22	23,578.00	-23,578.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105304-48100	Jul-22	32,415.00	-440,395.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105319-48100	Jul-22	4,919.00	-507,173.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105316-48100	Jul-22	1,753,375.00	-2,327,899.00	NCAS 5001-438...	NON-CI Authorized Budget		16800
5000-105305-48100	Jul-22	307,561.00	-307,561.00	NCAS 5001-438...	NON-CI Authorized Budget		16800

Review Budgetary Control Balances (Certified and Authorized)

To review budgetary control balances (Certified and Authorization) in NCFS, please follow the steps below. There are 10 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Budgetary Control** tab and then click the **Budgetary Control** app.

Image



Step 3. On the **Budgetary Control Dashboard** page, click the **Tasks** icon, and click **Review Budgetary Control Balances**.

Image

Budgetary Control Dashboard

Budget Monitor

View     Detach Budget Account Group 016040 * Budget Period Jun-23 * Balance

Agency	Budget Fund	Budget (USD)	Consumption (USD)	
		Total	Total	

Failures Requiring Attention

Failed Transactions (0) Cash Budget Status Exceptions (0)

Budgets

- Manage Control Budgets
- Enter Budgets in Spreadsheet
- Review Budget Entries
- Review Budgetary Control Balances
- Review Budgetary Control Transactions

Period Close

- Budget Period Statuses
- Manage Encumbrance Carry Forward Rules
- Carry Forward Funds Available
- Carry Forward Purchase Order Budgetary Control Balances

Step 4. On the **Review Budgetary Control Balances** page, select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

In this example, we choose **NC Authorized** for **Control Budget**, **Period to date** for **Amount Type** (You also have an option to query for Year to date), **Mar-22** for **From Budget Period** and **To Budget Period**, **1400** for **Agency**, **102000** for **Budget Fund**, **52824000** for **Account**, **1401000** for **Agency Management Unit**.

Image

Review Budgetary Control Balances

Done

Control Budget NC Authorized ▼

Saved Search ▼

Search

Amount Type Period to date ▼

* From Budget Period Mar-22 ▼

* To Budget Period Mar-22 ▼

Funds Available All amounts ▼

Currency USD

* Agency 1400 ▼

* Budget Fund 102000 ▼

* Account 52824000 ▼

* Agency Mgmt Unit 1401000 ▼

* Agency Program 0000000 ▼

* Funding Source 0000 ▼

* Project 0000000000 ▼

* Inter Fund 000000 ▼

* Future 1 0000 ▼

* Future 2 000000 ▼

* Future 3 00000 ▼

Search

Reset

Save

Budget Balances

View ▼



Detach

Transfer Budget ▼

0

Step 5. Under the **Budget Balances** section, the budgetary control balances are displayed.

Image

Control Budget

NC Authorized

Saved Search

Search

Amount Type

Period to date

* From Budget Period

Mar-22

* To Budget Period

Mar-22

Funds Available

All amounts

Currency

USD

* Agency

1400

* Budget Fund

102000

* Account

52824000

* Agency Mgmt Unit

1401000

* Agency Program

0000000

* Funding Source

0000

* Project

0000000000

* Inter Fund

000000

* Future 1

0000

* Future 2

0000000

* Future 3

00000

Search

Reset

Save

View Detach Wrap Transfer Budget														
	Agency	Budget Fund	Account	Agency Mgmt Unit	Agency Program	Funding Source	Project	Inter Fund	Future 1	Future 2	Future 3	Unreleased	Commitments	Obligations
	1400	102000	52824...	1401000	0000000	0000	00000000000	000000	0000	000000	00000	0.00	0.00	0.00
Total												0.00	0.00	0.00

Image

Review Budgetary Control Balances

[Done](#)Control Budget NC Authorized ▼Saved Search ▼

Search

Amount Type Period to date ▼* From Budget Period Mar-22 ▼* To Budget Period Mar-22 ▼Funds Available All amounts ▼Currency USD* Agency 1400 ▼* Budget Fund 102000 ▼* Account 52824000 ▼* Agency Mgmt Unit 1401000 ▼* Agency Program 0000000 ▼* Funding Source 0000 ▼* Project 0000000000 ▼* Inter Fund 000000 ▼* Future 1 0000 ▼* Future 2 000000 ▼* Future 3 00000 ▼

Search

Reset

Save

Budget Balances

View ▼



Detach



Wrap

Transfer Budget ▼



	Obligations	Other Consumption	Total Consumption	Funds Available Amount	Funds Available (%)	Initial Budget	Budget Adjustments	Total Budget	Expenditures
	0.00	0.00	0.00	-5,684.00	100.00	-5,684.00	0.00	-5,684.00	0.00
	0.00	0.00	0.00	-5,684.00		-5,684.00	0.00	-5,684.00	0.00

Step 7. On the **Review Budget Entries** page, click **Budget Entry Name** link.

Image

Review Budget Entries

[Done](#)

Control Budget NC Authorized

Budget Currency USD

Budget Period Mar-22

Budget Account 1400-102000-52824000-
1401000-0000000-0000-
0000000000-000000-0000-
000000-000000

Budget Balance -5,684.00 USD

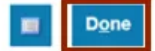
View    Wrap

	m/d/yyyy						
Budget Entry Date	Budget Entry Name	Budget Entry Classification	Source Amount	Amount Changed	Budget Amounts Entered As	Justification	
11/19/22	CONV FY20212...	Initial budget	-2,842.00	-2,842.00	New budget or r...		
Total				-2,842.00			

Step 8. On the **Budget Entry Details** page, under **Additional Information** section, review the budget entry details. Click the **Done** button which will redirect you to **Review Budget Entries** page.

Image

Budget Entry Details: CONV FY202123 TYPE NON-C...



Control Budget NC Authorized

Budget Entry Date 11/19/22

Budget Currency USD

Budget Amounts Entered As New budget or replacement of current budget

► Additional Information

View Detach Wrap

Budget Account	Budget Period	Source Amount	Amount Changed	Comment	Revision Type	Revision Number	Budget Code
1400-102000-52824	Mar-22	-2,842.00	-2,842.00	NCAS 1401-532...	NON-CI Authorized Budget		14160
Total		-2,842.00	-2,842.00				

Step 9. To view the control budget of **NC Agency to Account Default Advisory CB**. Select the applicable choices from the respective drop-down choice lists for the mandatory fields (marked with *) and click the **Search** button.

In this example, we choose **NC Agency to Account Default Advisory CB** for **Control Budget**, **FYS Jul-22** for **From Budget Period** and **To Budget Period**, **1400** for **Agency**, **102000** for **Budget Fund**, **55099999** for **Account**.

Image

Review Budgetary Control Balances

Done

Control Budget NC Agency to Account Default Advisory CB ▾

Saved Search ▾

Search

Amount Type	Period to date ▾	Funds Available	All amounts ▾	* Budget Fund	102000 ▾
* From Budget Period	FYS_Jul-22 ▾	Currency	USD	* Account	55099999 ▾
* To Budget Period	FYS_Jul-22 ▾	* Agency	1400 ▾		

Search Reset Save

Budget Balances

View ▾   Detach

Step 10. Under the **Budget Balances** section, the budgetary control balances are displayed.

Image

Review Budgetary Control Balances

Done

Control Budget NC Agency to Account Default Advisory CB ▾

Saved Search ▾

► Search

Budget Balances

View ▾    Detach  Wrap

	Agency	Budget Fund	Account	Budget Period	Initial Budget	Budget Adjustments	Total Budget	Expenditures	Total Consumption	Funds Available Amount	Funds Available (%)	Con
	1400	102000	55099999	FYS_Jul-22	40,85...	-206,801.00	-165,946.00	114,583.98	114,583.98	-280,529.98	169.05	
Total					40,855.0	-206,801.00	-165,946.00	114,583.98	114,583.98	-280,529.98		

Wrap-Up

View Budgets using the steps above, for any budget entries and budget control balances for appropriations, certified, authorized, LTD, and NC Agency to Account Default Advisory CB budgets of certified and authorization and funds checking control budgets.

Additional Resources

- Web-Based Training (WBT)
 - [BU001: Budget Inquiry](#)

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