



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

Accounting Services

Reference Manual for the Use of Gift Projects and the Project Lite System

Madison Campus

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What are the Criteria for Gifts?

Distinguish Fund 233 Gifts from Fund 233 Private Grants

Fund 233 Gifts Criteria

- Gifts must provide support for broadly defined activities, such as professorships, scholarships, building projects, fellowships, research and instructional programs. The donor may restrict the use of funds to a specific program area or purpose.
- No detailed technical or fiscal reports are required as a condition of the gift. The unit or faculty member involved may provide the donor with a brief summary of the results of supported activities and a statement that expenditures were made in accord with the intent to the gift. If detailed fiscal or technical reports are required, the gift becomes a research contract and must be awarded to the Board of Regents of the University of Wisconsin System, rather than to the UW Foundation.
- All patents, copyrights and other intellectual property rights that result from activities supported by the gift are not claimed by the donor.
- The gift contains no restrictive provisions, such as delays or advance notice concerning publication or dissemination of data and information derived from activities supported by the gift.
- The gift is irrevocable by the donor.
- Funding is not provided by any type of governmental, state, county or city municipality
- Funding is not provided by any type of higher education institution
- All research compliance questions must be answered on the Gift Routing Form

Fund 233 Private Grants

- When funding is received from any type of governmental, state, county, or city municipality the project must be classified as a Private Grants
- If the sponsor is an educational institution, either private or public, a hospital, and other non-profit organizations such as UWWMF, the project must be classified as a Private Grant
- Under GASB (Governmental Accounting Standards Board) and LAB (Legislative Audit Bureau), governmental and state agencies, along with higher education institutions, etc. are not chartered to make unrestricted gifts to other organizations such as the University of Wisconsin – Madison. However, on occasion, these entities may provide funds in the form of an unrestricted grant and must be classified as a Private Grant.

How Do I Complete a Gift Check Routing Form?

The form can be found at Accounting Services website in the Gift Area:
http://wneta.bussvc.wisc.edu/GiftForms/gift_main_menu.aspx

The web based gift form is available for routing checks for gift projects to your Dean's office. The form can be used when one or more checks need to be deposited into one or more projects, **all which are within the same division** (College of Ag & Life Sciences, School of Nursing, College of Letters & Science, etc.). If checks need to be deposited to accounts in multiple schools or colleges, one form is required for EACH division.

The screenshot shows the Accounting Services website for the University of Wisconsin-Madison. The header includes the university name, navigation links (UW Search, My UW, Business Services, 'How To' Pages), and a search bar. The main content area is titled "Gifts" and features a prominent red "Give" button. Below this, there are sections for "Policy", "How-To", "Resource", "Forms", and "Contacts". A left-hand navigation menu lists various services like Home, Campus Groups, Coding, Dates and Deadlines, Forms, Policies and Procedures, Related Links, Staff Directory, Training, and Areas (Accounts Payable, Cash Management, e-Reimbursement, File Room, Gifts, Non-Sponsored Projects, Property Control, Purchasing Card, Records Retention, Shared Financial System, Tax).

UNIVERSITY OF WISCONSIN-MADISON | UW Search | My UW | Business Services | 'How To' Pages

Accounting Services
Division of Business Services

Search:

Gifts

Policy

- Gift Policy
- Gift-in-Kind Policy
- Policy regarding cash balances in gift funds
- UWSA Sales Credit Policy - Internal Services Chargebacks (F24)

How-To

- Request gift funds from UWF to Fund 233 Projects (Detailed Instructions)
- How to deposit gift checks

Resource

- Is it a Gift or Sponsored Project?
- Reference Manual - Gift Projects and Project Lite System
- Fund 133 or 233 Guidance
- IRS Charitable Organizations - Substantiating Noncash Contributions - Form 8283
- IRS Substantiating Charitable Contributions - Publication 1771

Forms

- UW Gift Routing Form
- Gift Routing Form Instructions
- Gift-in-Kind Routing Form
- Gift Acknowledgement Letter

Contacts

If you have any questions regarding gifts or gift-in-kind contact giftmgt@bussvc.wisc.edu

Home

Campus Groups

Coding

Dates and Deadlines

Forms

Policies and Procedures

Related Links

Staff Directory

Training

Areas:

Accounts Payable

Cash Management

e-Reimbursement

File Room

Gifts

Non-Sponsored Projects

Property Control

Purchasing Card

Records Retention

Shared Financial System

Tax

Return to Accounting Services - Gifts
 For assistance with Gift Routing Forms, email giftmgt@bussvc.wisc.edu
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To complete a NEW Gift Routing Form:

A. Click on “Check Routing Form – Create New Entry”


B. Contact Information

- Select the **Add/Change Contact** button.
- Type last name and first name of the person who is completing the form. Select **Search**.
- Select the correct person. The program will fill in the appropriate data.

Return to Accounting Services - Gifts
 For assistance with Gift Routing Forms, email giftmgt@bussvc.wisc.edu
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C. Deposit Information

- Enter the information for each check you wish to deposit.
- You can add more checks by selecting the **Add New** button.
 A new set of blank boxes to enter additional checks will appear after selecting the **Add New** button.

 UNIVERSITY OF WISCONSIN-MADISON

Gift Check Routing Form

Print and send completed Gift Routing Form to your Dean's Office for approval.

CONTACT INFORMATION

Entry #	Name	Phone #	Email Address	Add/Change Contact
				<input type="button" value="Add/Change Contact"/>

ADD CHECKS

(When Check Donor is 'UWF' - Check Number and Check Date will default to 'TBD'.)

Check Seq#	Check Amount	Check Donor	Check Number	Check Date	Edit/Update	Delete
					<input type="button" value="Add New"/>	

Total Money From Checks: \$0.00
 Total Money Going to Projects: \$0.00
 These two values should be equal.
 There is \$0 not allocated to projects.

D. Add Projects

- Choose one of two options:
 - Option 1: Type Project ID and to search for an existing gift project.
 - Option 2: Type ALL fields with information for a new project and .

ADD PROJECTS

Option1: Search for an Existing Project:

Project ID:

Project Title:

PI Name:

Department ID:

Department Name:

Option2: Enter a New Project:

Project Title:

Donor Name:

Project Start Date (mm/dd/yyyy):

Project End Date(mm/dd/yyyy):

PI Name:

Department ID:

Department Name:

Return to Accounting Services - Gifts
 For assistance with Gift Routing Forms, email giftmgt@bussvc.wisc.edu
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- Complete all required information on View/Edit Project Information page and .

UNIVERSITY OF WISCONSIN-MADISON

View/Edit Project Information

Project ID:	233FS40				
Title:	OFFICE OF CORPORATE RELATIONS				
Donor Name:	UWF - UNIVERSITY OF WISCONSIN FOUNDATION				
Fund:	233				
Start Date:	6/20/2003				
End Date:	12/31/2099				
Department ID:	022430				
Department Name:	VC UNIV RELATNS™ OCR				
PI Name:	Sweeney Jr,Vincent J				
Amount:	<input type="text" value="400.00"/>				
Total Money From Checks: \$500.00					
Total Money Going to Projects: \$0.00					
PI Type:	<input checked="" type="radio"/> Faculty/Other	<input type="radio"/> Director	<input type="radio"/> Dean	<input type="radio"/> Chair	<input type="radio"/> Chancellor
PI Tenure Status:	<input checked="" type="radio"/> Permanent PI	<input type="radio"/> Limited PI	<input type="radio"/> Tenured PI		
Program Codes:	<input type="checkbox"/> All Activities	<input type="checkbox"/> 3 - Hospitals	<input type="checkbox"/> 7 - Physical Plant		
	<input type="checkbox"/> 0 - Student Services	<input checked="" type="checkbox"/> 4 - Research	<input type="checkbox"/> 8 - Auxiliary Enterprises		
	<input type="checkbox"/> 1 - Institutional Support	<input type="checkbox"/> 5 - Public Service	<input type="checkbox"/> 9 - Financial Aid		
	<input type="checkbox"/> 2 - Instruction	<input type="checkbox"/> 6 - Academic Support	<input type="checkbox"/> F - Farm Operations		
Human Subject Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Vertebrate Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Stem Cell Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Needs Space Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Environmental Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Toxic Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Building or Equipment Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			

- You will return to the main entry screen.
- When all information is complete, select the button.
- A PDF version of the form information will be created. Print this form for routing with the check(s).

The signature line is created when you print the Gift Check Routing Form.

- Principal Investigator – For new projects only, as they as not yet created in the system. The PI is not required to sign additions to existing projects.
- Department Chair – Based on your division’s requirements. Please check with your school or college’s research division for requirements.
- Division – Required in all cases.

How Do I Maintain Documents & Records?

- The new UWS GRS (General Records Schedule) provides retention policy on nearly all types of fiscal records. This includes coverage for general financial administration records, gift and grant administration, payments and receipts, state banking and cash management, general ledger, capital improvement and projects, internal controls, and collection.
- On January 31, 2007, the Public Records Board (PRB) approved the University of Wisconsin System General Records Schedule (UWS GRS) on Fiscal and Accounting Records. See <http://www.uwsa.edu/fadmin/records.htm>
- **UWSA Policy FISC901 *GIFT AND GRANT FOLDERS: NON-FEDERAL***
 - Records include transmittals, awards, budgets, and all other documentation related to the procurement of non-federal grants, as well as reports and supplemental information for verification of grants and contracts, both individually and in batch form.
 - This schedule applies to grants for which the granting agency requires a 3-year retention.
 - **Retention Time Period**
 - Original: Date of close of grant + additional 3 years and thereafter, destroy.
 - Duplicates: Date of close of grant + additional 1 year and thereafter, destroy.


How Do I Set Up a New Gift Project?

Set Up a New Project in Project Lite

1. Navigate to Project Costing>Project Definitions>General Information
2. Select the Add a New Value Tab
 - i. Confirm Business Unit UWMSN
 - ii. Project: is grayed out so you can't override assigned numbering sequence
3. Create: Defaults to and should remain "Blank Project"
4. Click Add

General Information

[Find an Existing Value](#) **Add a New Value**

Business Unit: 

Project:

Create:

[Find an Existing Value](#) | [Add a New Value](#)

Update the Project General Information Page

[General Information](#) | [Project Costing Definition](#) | [Manager](#) | [Location](#) | [Phases](#) | [Approval](#) | [Justification](#) | [User File](#)

Project: NEXT [Add to My Projects](#)

***Description:** **Program** **Processing Status:** Active

***Integration:**

Project Type: **Owning Dept**

Percent Complete: **As Of:**

Project Health: **As Of:** **UW Project Type**

Project Schedule

***Start Date:** ***End Date:** [Additional Dates](#)

Budgetary Control Dates

Start Date **End Date**

Description Find | View All First 1 of 1 Last

Date/Time Stamp: 08/02/07 12:45:16PM **User ID:** T2J

Description:

Long Description:

[Save as Template](#) [Copy Project](#)

1. **Complete General Information on this page**
 - a. Description: Enter project title up to 56 characters
 - b. Processing Status: Verify Active
 - c. Integration: Select UWMSN
 - d. Owning Dept: Leave blank
 - e. Project Type: Select GIFT
 - f. Percent Complete: Leave at 0.00
 - g. UW Project Type: Not Required
 - h. Project Health: Leave blank

Project Schedule

- i. Start Date: per the Gift Routing Form.
- j. End Date: 12/31/2099

Budgetary Control Dates

- k. Start Date: per the Gift Routing Form.
- l. End Date: 12/31/2099

2. **Click SAVE button to create the Project ID & create additional hyperlinks.**

Update the Project Team

Team
Team Detail

Team Member
Find | View All
First 1 of 1 Last

Project: PRJ111C **Description:** SUN EFFECTS **Processing Status:** Active

Start Date: 08/21/2007 **End Date:** 08/21/2007

***Employee ID:**
Name: STEFONEK,MARY

Email ID:
 Email Notify for Status Change

Description

Availability dates
Customize | Find | View All
First 1 of 1 Last

	*Project Role	Project Manager	*Start Date	*End Date	
1	<input type="text" value="PI"/>	<input type="checkbox"/>	08/21/2007	08/21/2007	+ -

Activity Team
Customize | Find | View All
First 1 of 1 Last

Activity	Description	Start Date	End Date		
	Main Content			+	-

Add Member to Activity Team

[Return to Project Team Summary](#)

Save
 Return to Search
 Refresh

1. Select the Team Detail Tab to add team information.
 - a. Employee ID: Click on magnifying glass to search for Principal Investigator (PI).
 - NOTE: Use the Employee Name lookup to find the PI.
 - NOTE: PI and Dean's office automatically receives Regent notice via email
2. Email ID: Additional email address to receive Regent Notice. (For example, a department's Grants Accountant may want to receive Regent Notice when a change has been made to their project).
3. Description: Leave as is

Availability Dates

4. Project Role: Select PI from magnifying glass
5. Project Manager Checkbox: Check this box
6. Start and End Dates automatically fill in
 - a. Click + and repeat d. – f. for additional investigators or co-investigators.
 - b. Click the Save button
 - c. Click on Return to Project Team Summary hyperlink
 - d. Click on Return to Project General hyperlink

Step 4. Complete Regent Reporting Information

1. Click on UW Project Lite Hyperlink on the Project General Information Page
2. This takes you to UW Project Lite Information Page

Save as Template Copy Project

Go To: [My Projects](#) [Project Valuation](#) [Project Team](#) [Project Activities](#) [UW Project Lite](#)

Project Lite Information

Project: PRJ41GI Description: Updates 2/3/08

Fund:

Sponsor:

Flow-Through:

Award Type:

Regent Category: RESCH

Award Number:

CFDA Number:

Total Budget Amount: 0.000

F & A Base:

F & A Rate %:

Rpts/Invs Req?

Cost Share?

Human/Animal/Bio?

Award Transactions								
	Send Email	Seq Nbr	Issue Date	Award Amount	Donor	Begin Date	End Date	Award Reference Number
<input type="checkbox"/>	<input type="checkbox"/>	1	02/03/2008	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

1. General information

- a. Fund: Enter 233
- b. Sponsor: Select Gift Donor. If the Sponsor/Gift Donor does not exist, contact giftmgt@bussvc.wisc.edu
- c. Flow-Through: Leave blank
- d. Award Type: Select OTHER
- e. F & A Base: Leave blank
- f. Regent Category: Select the appropriate category for purpose of award
- g. F & A Rate: Leave blank
- h. Award Number: Enter the date of the check
- i. CFDA Number: Leave blank
- j. Rpts/Invs Req: Check if appropriate
- k. Cost Share: Check if appropriate
- l. Human/Animal/Biosafety: Check if appropriate. Provide additional information as needed.
 - i. Certification Code
 - ii. Approval Date
 - iii. Expiration Date
 - iv. Assurance Number

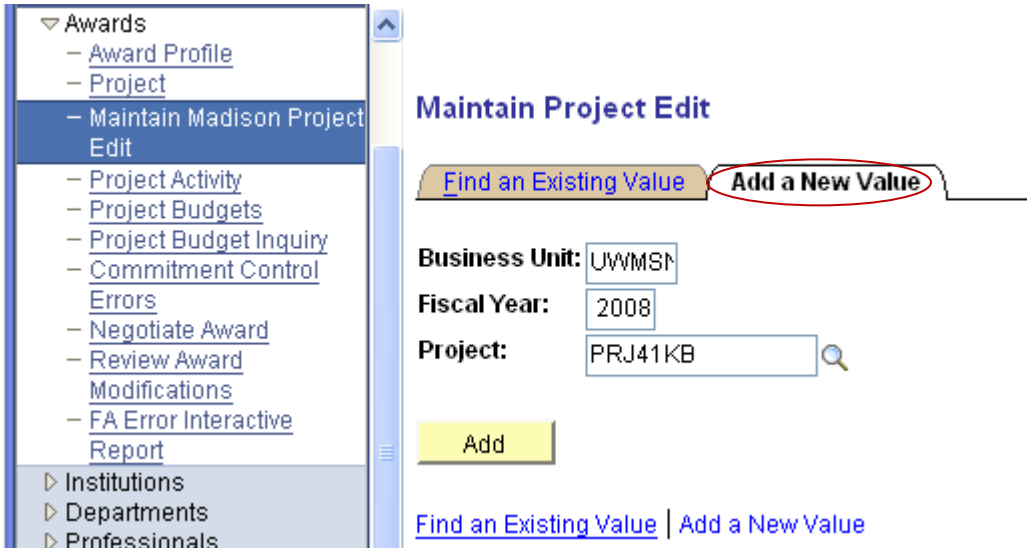
2. Award Transactions

- a. Send email: Check box to send the email notification of the project to the PI & email address indicated
- b. Issue Date: Leave as default to current date
- c. Award Amount: Enter amount of gift
- d. Donor: Required only if donation is greater than \$5000 and/or Multiple Donor
- e. Award Reference Number: Enter check number

3. Click Save

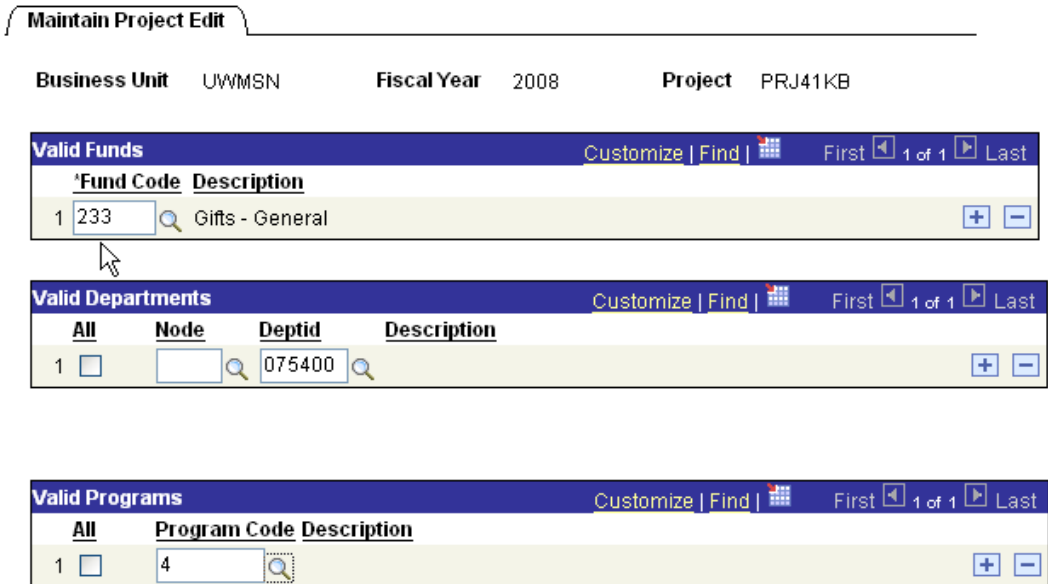
Step 5. Complete Madison Edits

1. Access the Maintain Madison Project Edits Page
 - a. Click on Maintain Madison Project Edits menu item
 - b. Select the Add a New Value tab
 - i. Business Unit: Enter UWMSN
 - ii. Fiscal Year: Enter the current Fiscal Year
 - iii. Project: Enter your newly created Project ID
 - c. Click the Add button



Valid Funds

- d. Fund Code: Enter fund number 233
 - e. Department
 - f. Program Codes
2. Click Save



Step 6. Complete Budget Information

- A. Budgets for Project Lite are not posted based on the information entered in the Project Lite panels but rather need to be posted directly via the General Ledger Journal Entry. Use the Budget JET Tool for this entry.

Step 7. Complete Revenue Entry & Deposit

- A. JET Tool Entry: An excel spreadsheet is used to enter all gift payments for a given day and then uploaded into JET.

NSCT												
Department	fund	Program	Project	Activity Id	Account	Class	Amount	Description	Jnl_Ln_Re	Reference	Voucher N	Invoice No
980100	233 R	PRJ31WI			9500		-100,000	UWF		CK#146040		
980100	1xx R	1000000			9200		100000	Deposit 999910000 10/30/09				

1. The debit entry should be made to a specific revenue pool.
Description should be the Deposit Slip Number and date. (e.g. DEPOSIT 99999XXXX 10/23/13)
 2. The credit entry should be made to the specific project number.
 3. The credit entry description field should be the sponsor name and Check #. (e.g. UWF Check #1234)
 - **NOTE: If the project is new, the JET entry will need to be completed the next day to pass edit checking.**
 4. Print the journal once it has been uploaded into the JET tool. Make a copy of the journal entry for each project number. The journal entry copy should be filed into entered on the journal. Highlight each line item for the corresponding payment entry. This will be used later to reconcile the budget entry and Award summary page from Project Lite.
- B. Complete the Deposit Slip
 1. Prepare the bank deposit slip and send to bank

Step 8. Reconciliation

- A. In order to maintain accurate records, the Budget, Revenue and Regent Report (Project Lite print out) must be reconciled
- B. Check to ensure all entries match

How Do I Add to an Existing Project?

Step 1: Add to an Existing Project

1. Navigate to Project Costing>Project Definitions>General Information
2. Select the Find an Existing Value Tab
3. Business Unit: UWMSND
4. Project: Enter the Project number
 1. Note: If you do not have
5. Click Search
6. Select the hyperlink to the Project requiring updates

Project General
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Business Unit: = [v] UWMSN [m]
Project: begins with [v] 233F [m]
Description: begins with [v] [m]
Program: = [v] Detail Project [v]
Processing Status: = [v] [v]

Include History Correct History Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First [v] 1-2 of 2 [v] Last

Business Unit	Project	Description	Project Type	Processing Status
UWMSN	233FC23	REL 4 TEST PROJECT FOR PI 00000		Active
UWMSN	233FF75	REL 4 TEST PROJECT FOR PI 00000		Active

Step 2: Complete Regent Reporting Information

1. From the Project General Page which results when you select the Project Hyperlink, select the UW Project Lite hyperlink.

Go To: [My Projects](#) [Project Valuation](#) [Project Team](#) [Project Activities](#) [More](#) [UW Project Lite](#)
[No Cost Share](#)
[Madison Project Edits](#)

2. From the Project Lite Page, select the + button under Award Transactions Section to open an additional line to enter an addition to this gift.

Send Email	Seq Nbr	Issue Date	Award Amount	Donor	Begin Date	End Date	Award Reference Number
<input type="checkbox"/>	1	12/26/2007	50000.000	Ronald Regan Foundation, Yorvilinda CA			12262007
<input type="checkbox"/>	2	02/03/2008					

3. Complete the information on the newly created line to account for the additions to the funding.
 - a. Send Email: Select this check box to send the email notification of the project to the PI & email address indicated
 - b. Issue Date: Leave as default to current date
 - c. Award Amount: Enter the dollar amount of the gift payment
 - d. Donor: This is a free form text field and should be used only if the Multiple Donor & donation is greater than \$5000
 - e. Award Reference Number: Enter the check number

Step 3. Add Madison Edits

- A. Typically, the edits may remain the same after a project is set up, but on occasion there may be additional departments or program codes that need to be added to a project.
 1. Access the Maintain Madison Project Edits Page
 - a. Click on Maintain Madison Project Edits menu item
 - b. Select the Add a New Value tab
 - i. Business Unit: Enter UWMSN
 - ii. Fiscal Year: Enter the current Fiscal Year
 - iii. Project: Enter your newly created Project ID
 - c. Click the Add button

Valid Funds

- d. Fund Code: Enter fund number 233
- e. Department
- f. Program Codes
2. Click Save

Maintain Project Edit

Business Unit UWMSN Fiscal Year 2008 Project PRJ41KB

Valid Funds		Customize Find	First	1 of 1	Last
Fund Code	Description				
1 233	Gifts - General				

Valid Departments		Customize Find	First	1 of 1	Last
All	Node	Deptid	Description		
1		075400			

Valid Programs		Customize Find	First	1 of 1	Last
All	Program Code	Description			
1	4				

Step 4. Complete Budget Information

- B. Budgets for Project Lite are not posted based on the information entered in the Project Lite panels but rather need to be posted directly via the General Ledger Journal Entry. Use the Budget JET Tool for this entry.

Step 5. Complete Revenue Entry & Deposit

- A. JET Tool Entry: An excel spreadsheet is used to enter all gift payments for a given day and then uploaded into JET.

NSCT	Department	fund	Program	Project	Activity Id	Account	Class	Amount	Description	Jnl_Ln_Re	Reference	Voucher N	Invoice No
	980100	233 R		PRJ31WI		9500		-100,000	UWF		CK#146040		
	980100	1xx R		1000000		9200		100000	Deposit 999910000 10/30/09				

1. The debit entry should be made to a specific revenue pool.
Description should be the Deposit Slip Number and date. (e.g. DEPOSIT 99999xxxx 10/23/13)
 2. The credit entry should be made to the specific project number.
 3. The credit entry description field should be the sponsor name and Check #. (e.g. UWF Check #1234)
 - **NOTE: If the project is new, the JET entry will need to be completed the next day to pass edit checking.**
 4. Print the journal once it has been uploaded into the JET tool. Make a copy of the journal entry for each project number. The journal entry copy should be filed into entered on the journal. Highlight each line item for the corresponding payment entry. This will be used later to reconcile the budget entry and Award summary page from Project Lite.
- B. Complete the Deposit Slip
1. Prepare the bank deposit slip and send to bank

Step 6. Reconciliation

- A. In order to maintain accurate records, the Budget, Revenue and Regent Report (Project Lite print out) must be reconciled
- B. Check to ensure all entries match

How Do I Make Corrections and Changes?

There are four areas where a correction or change can occur. It is important to remember that a change made to one area does not automatically update the others. For example, if you make a correction to the project budget, a corresponding revenue and Project Lite correction may need to be completed to one or more projects involved in the correction.

A. Budget Correction

- a. Scenario: Budget was applied to the wrong project.
 - i. Reduce the budget on the 'wrong' project. (Negative entry)
 - ii. Increase the budget on the 'correct' project. (Positive entry)
 - iii. Verify Project Lite and revenue entries were entered properly. If they are also incorrect, you will need to reduce the Project Lite and revenue amounts on the 'wrong' project and enter the information (positive entry) on the correct project number.
- b. Scenario: Budget should not have been added to the project
 - i. Reduce the budget on the project (Negative entry)
 - ii. Reduce the Project Lite entry and revenue entry if necessary (Negative entries)

B. Revenue Correction

- a. Scenario: Revenue was applied to the wrong project.
 - i. Reduce the revenue on the 'wrong' project. (Debit entry)
 - ii. Increase the revenue on the 'correct' project. (Credit entry)
 - iii. Verify that the budget and Project Lite entries were entered properly. If they are also incorrect, you will need to reduce the Project Lite and budget amounts on the 'wrong' project and enter the information (positive entry) on the correct project number.
- b. Scenario: Revenue should not have added to the project
 - i. Reduce the revenue on the project (Debit entry to the project and a Credit entry to the pool account.
 - ii. Reduce the Project Lite entry and budget entry if necessary (Negative entries)

C. Project Lite Correction

- Scenario: An amount was entered to the wrong project in Project Lite.
 - Reduce the amount on the 'wrong' project. (Negative entry) Enter "Correction for Check #xxxx. Should be PRJxxxx" in the description field of Project Lite
 - Enter the amount on the 'correct' project in Project Lite. The description should be the sponsor name and check number.
 - Verify that the budget and revenue entries were entered to the correct project. If they are incorrect, make a negative entry for the incorrect budget and revenue to

the 'wrong' project. Make a positive entry to the budget and revenue on the correct project number.

D. Edits (Madison Project Edits)

1. Scenario: A change to the Edit information is needed
2. Access the Maintain Madison Project Edits Page
3. Click on Maintain Madison Project Edits menu item
4. Click on the 'Find an Existing Value' Tab
5. Enter the project number in the 'Project begins with' field. This will take you to the Madison Project Edit page
6. Click the + (Plus) icon to add rows to the Valid Department or Valid Program section
7. Click the – (Negative) icon to delete a row to the Valid Department or Valid Program section

E. **NOTE:** The policy for setting up a fund on a project is that only one fund is allowed on a project. Projects cannot have multiple funds.