**Perkins Carry Over Modification Instructions**

**Before You Begin**

Your modification process will need **two separate Perkins documents**:

1. **Your college’s Local Plan and Budget**
2. **Budget Modification Template**

**Preparing Your Documents**

1. **Prepare Your Current Local Plan and Budget**:
   * Open the **2024-2025 approved plan’s Excel file** previously submitted in NCPerkins Moodle. This is your college’s approved multi-tab Excel file submitted by May 31, 2024.
   * **Rename this file** (e.g., “Community College Modification MMYYYY”). This will be the file you’ll submit to Moodle after making your updates.
2. **Download the Budget Modification Template**:
   * In Moodle, go to **My Courses**, then **2024-25 Perkins Basic Grant**, and find the **"Budget and Plan Modifications (submit as needed)"** section. Download the modification template from here.

**Steps to Modify Your Budget**

1. **Enter Your Current Budget**:
   * Go to the **Budget tab** in your renamed **Local Plan and Budget** file and locate your approved total budget found in **Column F**.
   * Next, in the **Budget Modification Template**, enter this budget total in **Column F: “Enter Current Budget”**.
2. **Update Your Allotment**:
   * In the **Local Plan and Budget** file, locate **cell A2** labeled “Enter Your College’s Total Allotment Below.”
   * Update the planning allotment to match the new **total allotment**. This includes your state board-approved budget, plus your carry over and any needed adjustments between your planning budget and state-approved budget.
   * **Important Note:** A college’s maximum allowable administration (Voc Code 10) is based solely on the state board-approved budget, which is .05% of the college’s budget excluding the required WIOA infrastructure contribution.  Indirect administration costs cannot be allocated to carryover funds. See the approved State Aid Allocation and Budget Policies Board Item for the allowable Admin amount available. https://www.nccommunitycolleges.edu/about-us/board-meetings/17588-2/
3. **Make and Document Budget Adjustments**:
   * Make any updates you need to the current budget, adding additional funds where necessary.
   * Document all modifications in **Column H** of your revised plan:
     + **For additions**: Enter the amount and a brief explanation in the **Status Update column** (merged Columns I & J).
     + **For removals**: Remove the amount, select “removed” in the status, and note the removed amount in the Status Update.
   * **New Activities**: If adding new activities, list where the need for this activity is addressed in your CLNA in **Column C**.
4. **Add New Rows as Needed**:
   * If adding rows within a vocational (voc) code, insert these **above the last row** of the code to ensure the formulas continue to function correctly on the budget tab.
5. **Check Your Remaining Budget**:
   * Confirm that all funds are budgeted accurately. The “Remaining Budget” in **cell A5** should equal **0**.
6. **Apply Special Updates for Specific Voc Codes**:
   * **Voc Code 17**: If you make changes, also update the **Equipment tab**.
   * **Voc Code 18**: If adjusted, make corresponding changes on the **Salaries and Benefits tab**.
7. **Enter Modifications in the Template**:
   * In the **Budget Modification Template**, document each change in the **“Enter Change Requested”** column, ensuring the “Proposed Modified Budget” matches the budget tab in your revised plan.
   * Be sure to provide a justification for the changes in the “**Justification – include CLNA reference”** if needed.

**Submitting Your Modification**

1. **Get Signatures**:
   * Make sure the **budget modification** form is signed by both your primary Perkins contact and your college’s CFO.
2. **Upload to NCPerkins Moodle**:
   * In Moodle, go to the **"Budget and Plan Modifications"** section and click on **"Submit a Local Plan & Budget Modification Request"** to upload both your modified local plan and the signed budget modification form.
3. **Approval Process**:
   * Once the Executive Director and Assistant Director for Perkins/CTE approve your modifications, a signed copy will be emailed to the Perkins Primary Contact. At that point, your college may begin implementing the approved changes to your plan and budget.
   * **Important Note:** Follow your college’s internal process to adjust the Perkins budget accordingly for each modification, as this will help prevent future budget discrepancies.
   * Please keep these documents in your college’s official Perkins records.