Changing a budget’s status on the Reconciliation Report is one method for a Principal Investigator or Manager to indicate they have performed a review of a budget’s activity for a given month.

To learn more about the Reconciliation Report visit: [https://finance.uw.edu/myfd/reconciliation](https://finance.uw.edu/myfd/reconciliation)

1) From the MyFD application home page:
   a) Select ‘Reconciliation’ from the Reports drop-down menu. *Skip this step if you were sent a direct link.*

2) Enter a budget and select the month/year you would like to review and then click ‘GO’.

3) Review the budget activity according to your departmental guidelines.

4) Statuses must be set in sequential order. The current status is indicated in **bold**. All previous statuses must be used before the status can be changed to PI or Secondary review.

5) Click the ‘Change Status/Audit Trail’ button. Status may not be changed until after a month closes.

6) From here:
   a) ‘Sign-off Approved (Done)’ indicates your approval of this budget/month’s activity.
   b) Leave an optional Status Change comment.
   c) **Reject - Return to IN PROCESS:** A comment is required when rejecting. MyFD will send an email to the Reconciler in the event of a rejected reconciliation status.

7) ‘Save and Close’ *
   a) Your UW NetID and any comments will be saved in the audit trail.

*MyFD does not send email notifications when normal status changes or reconciliation activity occurs.