Budget Department Transfer (BDT)

This type of Budget Transfer is used when a department would like to move multiple budgets within the same fund and organization (i.e. transfer $1,000 from O&M (72B0) to Travel (71B1) for two different fund and org combinations)

1. Log in to mySFA, choose the “myServices” tab, and click “Self-Service Banner”

2. In the Main Menu screen, choose “Finance”

3. In the Finance Menu, choose “Budget Transfer”
4. Begin entering your Budget Transfer data. We will use the $1,000 transfer from O&M (72B0) to Travel (71B1) as an example in the screen shot below.

- **Transaction Date:** Automatically defaults to today’s date
- **Journal Type:** BDT
- **Transfer Amount:** Total of all transaction amounts
- **Enter “From” and “To” information (see detail below)**
- **Description:** Brief description of the reason for the transfer (i.e. transfer O&M funds to cover travel or transfer O&M funds to cover student wages)
- **Budget Period:** 01
- **Enter Template Name to save as a template, if desired.**
- **Do not check “Shared”**
- **Click “Complete”**
5. Once the transfer is complete, a message should appear at the top of the screen that reads “Document JXXXXXXX completed and forwarded to the approval process.”

   - If you do not see this message, your transfer has not been completed.