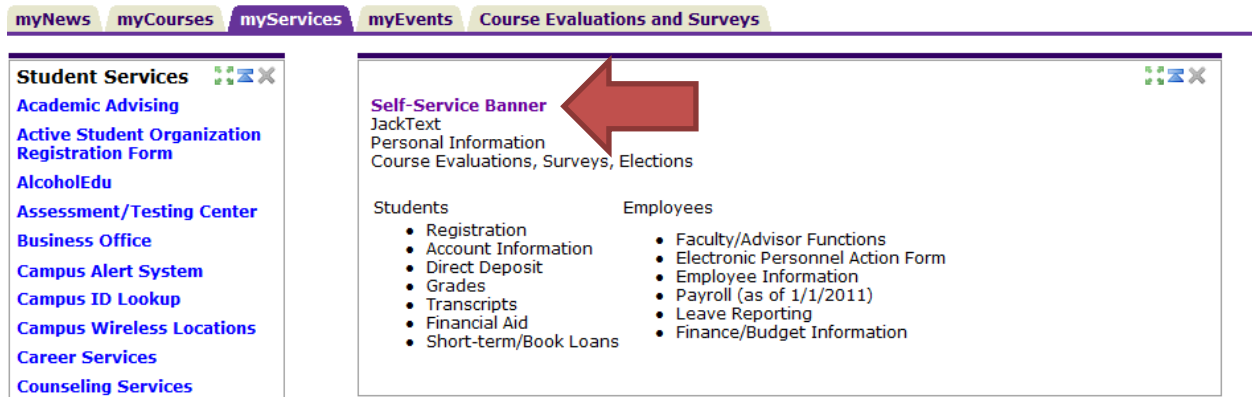


Budget Department Transfer (BDT)

- ❖ 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)

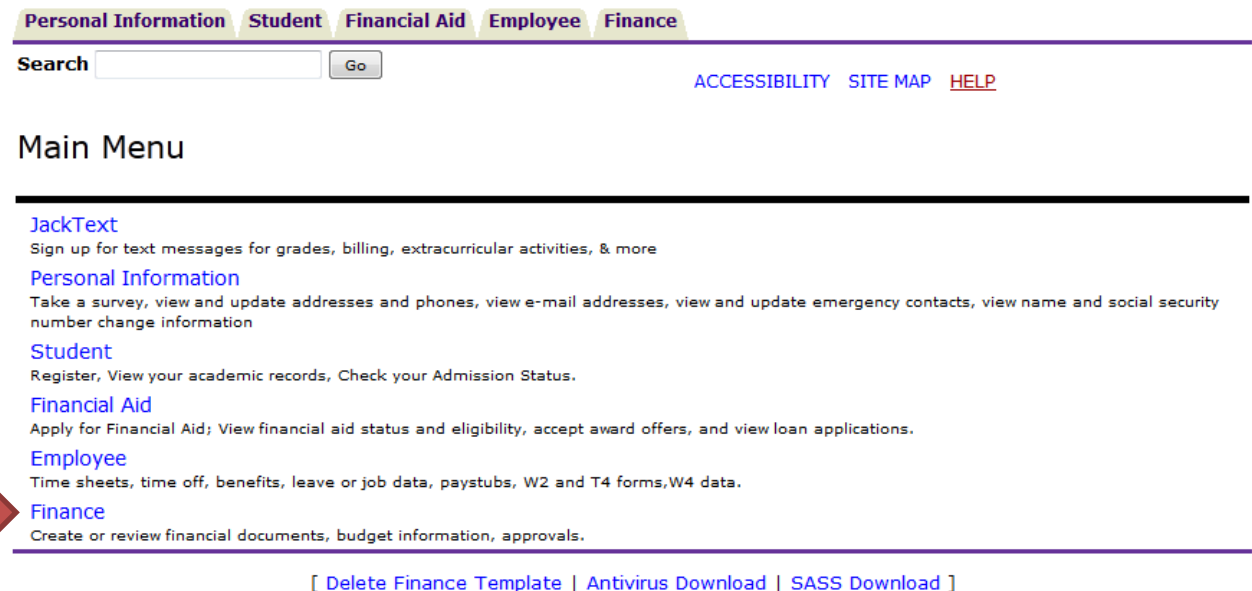
1. Log in to **mySFA**, choose the “**myServices**” tab, and click “**Self-Service Banner**”



The screenshot shows the mySFA interface with the 'myServices' tab selected. The 'Self-Service Banner' link is highlighted with a red arrow. The banner lists services for Students and Employees.

Students	Employees
<ul style="list-style-type: none">• Registration• Account Information• Direct Deposit• Grades• Transcripts• Financial Aid• Short-term/Book Loans	<ul style="list-style-type: none">• Faculty/Advisor Functions• Electronic Personnel Action Form• Employee Information• Payroll (as of 1/1/2011)• Leave Reporting• Finance/Budget Information

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



The screenshot shows the mySFA Main Menu screen. The 'Finance' link is highlighted with a red arrow. The menu lists various services like JackText, Personal Information, Student, Financial Aid, Employee, and Finance.

[JackText](#)
Sign up for text messages for grades, billing, extracurricular activities, & more

[Personal Information](#)
Take a survey, view and update addresses and phones, view e-mail addresses, view and update emergency contacts, view name and social security number change information

[Student](#)
Register, View your academic records, Check your Admission Status.

[Financial Aid](#)
Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications.

[Employee](#)
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

[Finance](#)
Create or review financial documents, budget information, approvals.

[[Delete Finance Template](#) | [Antivirus Download](#) | [SASS Download](#)]

RELEASE: 8.5.1

3. In the Finance Menu, choose “**Budget Transfer**”

Finance

- [Budget Queries](#)
- [Encumbrance Query](#)
- [Approve Documents](#)
- [View Document](#)
- [Budget Transfer](#)
- [Multiple Line Budget Transfer](#)
- [Budget Development](#)
- [Delete Finance Template](#)



[[Budget Queries](#) | [Encumbrance Query](#) | [Approve Documents](#) | [View Document](#) | [Budget Transfer](#) | [Multiple Line Budget Transfer](#) | [Budget Development](#) | [Delete Finance Template](#)]

RELEASE: 8.6

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"

Multiple Line Budget Transfer Form

Begin by creating a multiple line budget transfer or retrieving an existing template. If available budget exists, budget can be transferred among a maximum of five sets of accounting elements for different charts.

Choose Complete to perform a validation and forward the document for processing.

Use Code Lookup to query a list of available values.

Use template

Transaction Date

Journal Type

Document Amount

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	S		107550	XXXXX	72B0	100			1000	-
2			107550	XXXXX	71B1	100			1000	+
3			150002	XXXXX	72B0	100			2000	-
4			150002	XXXXX	71B1	100			2000	+
5										+

Description

Budget Period

Save as Template

Shared

Code Lookup

Chart of Accounts Code

Type

Code Criteria

Title Criteria

Maximum rows to return

- Enter "S" in the "Chart" field
- Enter Fund, Org, Account, and Program you wish to transfer "from" with a (-) sign.
- Leave "Activity" & "Location" fields blank

- Enter Fund, Org, Account, and Program you wish to transfer "to" with a (+) sign.
- Leave "Activity" & "Location" fields blank

Always 01



- 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.

Budget Transfer

Begin by creating a budget transfer or retrieving an existing template. If available budget exists, budget can be transferred from only one set of accounting elements to another within the same chart.

Choose Complete to perform a validation and forward the document for processing.

Use Code Lookup to query a list of available values.

✔ Document J0001865 completed and forwarded to the approval process.