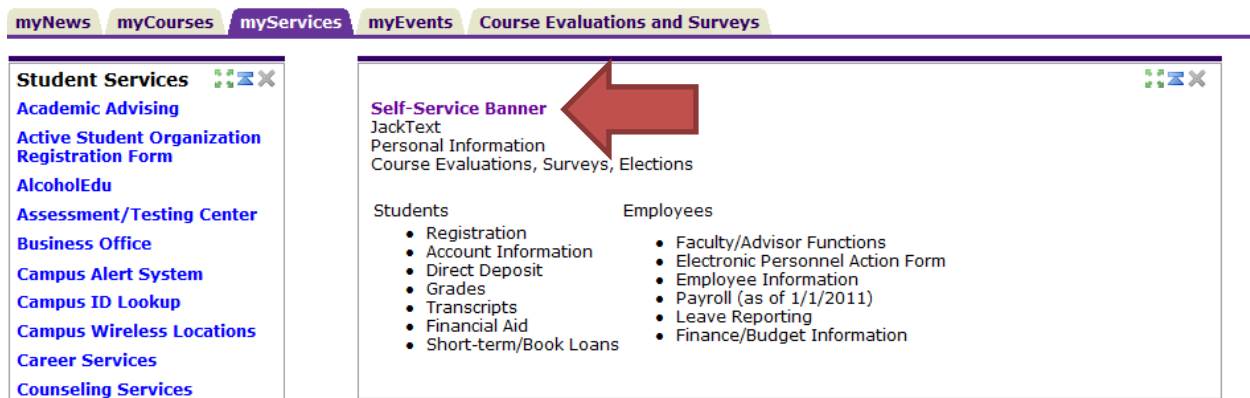


Budget Department Transfer (BDT)

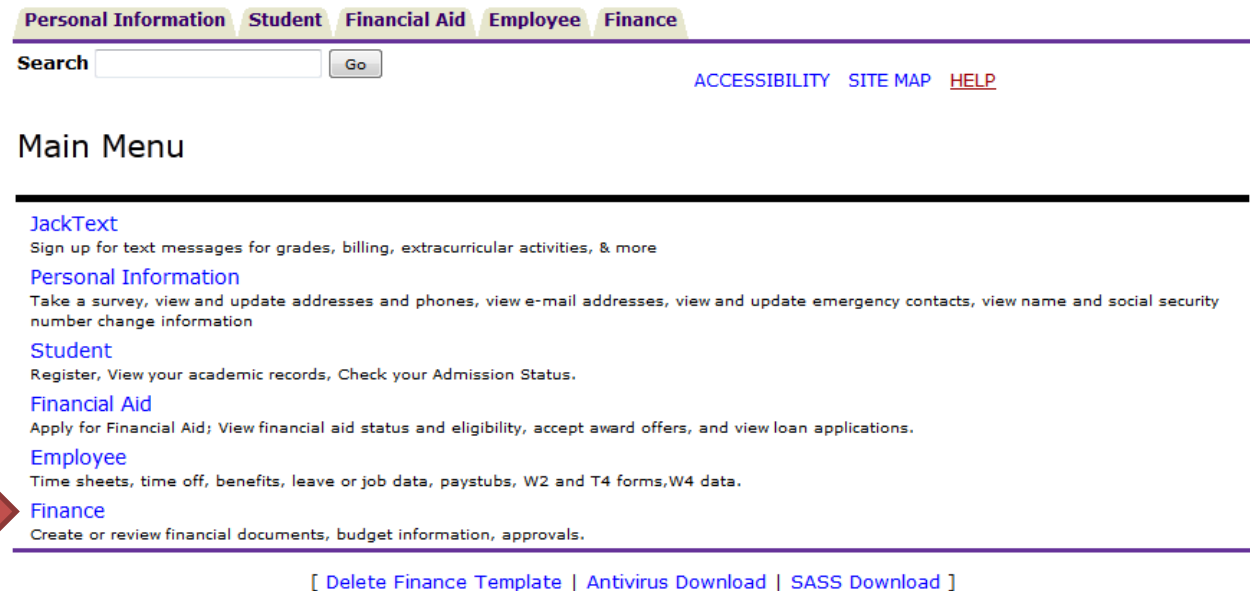
❖ This type of Budget Transfer is used when a department would like to move budget within the same fund and organization (i.e. transfer \$1,000 from O&M (72B0) to Travel (71B1))

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



The screenshot shows the mySFA navigation menu with the following tabs: myNews, myCourses, myServices (selected), myEvents, and Course Evaluations and Surveys. The left sidebar lists various services under 'Student Services', including Academic Advising, Active Student Organization Registration Form, AlcoholEdu, Assessment/Testing Center, Business Office, Campus Alert System, Campus ID Lookup, Campus Wireless Locations, Career Services, and Counseling Services. The main content area displays the 'Self-Service Banner' with a red arrow pointing to it. Below the banner, there are two columns of links: 'Students' (Registration, Account Information, Direct Deposit, Grades, Transcripts, Financial Aid, Short-term/Book Loans) and 'Employees' (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**”

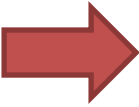


The screenshot shows the Main Menu screen with the following navigation tabs: Personal Information, Student, Financial Aid, Employee, and Finance (selected). Below the tabs is a search bar with a 'Go' button and links for ACCESSIBILITY, SITE MAP, and HELP. The main content area lists several services: 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.), and Finance (Create or review financial documents, budget information, approvals.). A red arrow points to the 'Finance' link. At the bottom, there are links for [Delete Finance Template | Antivirus Download | SASS Download] and the text '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: Desired transfer amount
 - 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"

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.

Use template

Transaction Date

Journal Type

Transfer Amount

Document Amount 0.00

	Chart	Index	Fund	Organization	Account	Program	Activity	Location	D/C
From	S		107550	XXXXX	7280	100			-
To			107550	XXXXX	7181	100			+

Description Budget Period

Save as Template

Shared

Always 01

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"
- Leave "Activity" & "Location" fields blank

- Enter Fund, Org, Account, and Program you wish to transfer "to"
- Leave "Activity" & "Location" fields blank



RELEASE: 8.5.0.4

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.

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.