



BUDGET TRANSFERS in Dynamic Forms (updated 9.17.25)

Form

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Timer allows 45 minutes
before timing out

Timer Hide
45 minutes

* = required field

Some content may be updated based on selection



**STEPHEN F. AUSTIN
STATE UNIVERSITY**
NACOGDOCHES, TEXAS

Budget Office
budget@sfasu.edu

Budget Transfer Request

Budget transfers are used to move available budget to a different Fund-Organization-Account-Program (FOAP) combination.

Budget transfers should be submitted in anticipation of incurred or upcoming commitments or expenditures so that the budget actually reflects the plans and spending of the department.

When transferring funds from a FOAP, please ensure that there is sufficient budget remaining to cover existing or anticipated expenditures and encumbrances.

For the transfer of actual revenue or expenses, please use the Expenditure/Revenue Transfer Request form

Prefilled Requestor data

Requestor Info

Requestor Name: * Suzy Smith

Department: * English

SFA Phone #: *

Email: * Suzy.Smith@sfasu.edu

Request Description and Documentation

Provide a brief description that adequately explains the nature/intent of this request.
(ex. recognize cash gift revenue, or fund equipment and supplies for classroom)

*

Provide a description and attach a screenshot of the budget entry (from SSB Budget Query or FGIBDSR) to be moved and any other supporting documentation for this request

Attach a screenshot/snip of the budget entry to be moved.
(SSB Budget Query or FGIBDSR)

Include any additional documentation that supports this request,
such as emails, memos, internal spreadsheets, etc.

* Attach File

Attach File

Attach File

Selecting request type and number of entries

Select the type of Transfer from the list

Then, select from the # of entry lines for the transfer type

Select the type of Budget Transfer

- * ☒ Transfer Budget within the SAME Fund
- ☐ Transfer Budget between DIFFERENT Funds
- ☐ Recognize Revenue within the SAME Fund
- ☐ Recognize Revenue between DIFFERENT Funds

Select the number of accounting entries lines needed for this request

- * ☒ 20 lines of entry, or less
- ☐ More than 20 lines of entry

Selecting the number of entries will display information and resources and the appropriate entry method for your selections (see next page)

Transfer Information and Resources

Acceptable Budget Transfers

Within the SAME Fund

Between Restricted (28xxxx - 29xxxx)

FROM Restricted (28xxxx - 29xxxx)

TO Discretionary Designated (150001, 150008, 150010)

Document Links

[Discretionary Use of University Funds](#) HOP 05-202

See [Financial Reporting Guidelines](#) for:

Funds That Can Be Used For Discretionary Purposes,
and Guidelines for Expenditures from University Funds

Acceptable Account Codes

54xxxx	Department Gifts	■	55xxxx	Department Sales & Service	■		
670081	Adjunct Faculty Salaries	■	670110	Graduate Research Assts	■	670710	Moving Expenses
670082	Academic Affairs Supplemental	■	670140	Student Employees	■	67B1	Employee Benefits Budget Pool
670090	Graduate Teaching Assts	■	670141	Student Workstudy Wages	■	71B1	Travel Budget Pool
670101	Graduate Research Assts	■	670151	Stipends	■	72B0	Operations & Maintenance Budget Pool
670102	Addl Comp Professional Salaries	■	670153	Classified Wages	■	73B0	Capital Outlay Budget Pool
670103	Graduate Administrative Assts	■	670310	Cell Phone Allowances	■	74B0	Grant Scholarships and Fellowships Pool

Accounting Entries – Enter on Form

Transfer Budget **or** Recognizing Revenue **within the SAME Fund** will provide 10 lines of FROM and TO entries.

Transfer Budget **or** Recognizing Revenue **between DIFFERENT Funds** will provide 5 lines of FROM and TO entries.

Examples

Select the type of Budget Transfer

* ☒ Transfer Budget within the SAME Fund

☐ Transfer Budget between DIFFERENT Funds

☐ Recognize Revenue within the SAME Fund

☐ Recognize Revenue between DIFFERENT Funds

Select the number of accounting entries lines needed for this request

* ☒ 20 lines of entry, or less

☐ More than 20 lines of entry

Transfer Budget within the SAME Fund				
Transfer FROM				
Fund	Org	Acct	Prog	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			TOTAL	\$ 0.00

Transfer TO				
Fund	Org	Acct	Prog	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			TOTAL	\$ 0.00

Transfer Budget within the SAME Fund was selected.
 Check the box below to validate that all funds entered are the same Fund.

☐ The SAME Fund was used for all entries.

Select the type of Budget Transfer

* ☐ Transfer Budget within the SAME Fund

☐ Transfer Budget between DIFFERENT Funds

☐ Recognize Revenue within the SAME Fund

☒ Recognize Revenue between DIFFERENT Funds

Select the number of accounting entries lines needed for this request

* ☒ 10 lines of entry, or less
☐ More than 10 lines of entry

Fund	Org	Acct	Prog	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	TOTAL	\$ 0.00

Transfer **TO**

Fund	Org	Acct	Prog	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	TOTAL	\$ 0.00

Recognize Revenue within DIFFERENT Funds was selected.
 Check the box below to validate that all funds entered are NOT the same Fund.

* ☐ DIFFERENT Funds were used for these entries.

Accounting Entries – Bulk Entry by Excel Template

Budget Transfers or Recognizing Revenue requests that require **MORE THAN** the provided lines of entry will be processed as a Bulk Entry and require an excel template.

The template can be found on the Budget Office website.

Attach an excel Budget Transfer template with the accounting entries

Bulk Entry by Excel Template	
Use the Budget Transfer excel template to enter the data for this request.	Budget Transfer excel template (add hyperlink)
Blank rows between entries and \$0.00 entries must be removed before submitting.	Budget Transfer Template * <input type="button" value="Attach File"/>
Enter the Total Amount (Debits + Credits) from the template . (do not copy the formula)	Total Amount * <input type="text"/>

Approvals

Budget Transfers will be routed to department heads or designees for approval. Academic Affairs departments will also be routed for review by the VPAA Budget Analyst and the Dean's Office or Department Head.

Additional approvals will be required for Recognizing Revenue for transfer of \$50,000 or greater, as follows:

- \$50 K Budget Director
- \$100 K VP Finance
- \$250 K SR VP Organizational Effectiveness
- \$2.5 M President

Return for Revision: Any reviewer/approver may return the form for revision if a correction needs to be made or if the transfer is not acceptable. Returning a form will clear the form of any other signatures after the participant the form is returned to.

****Form information may only be revised by the requestor****

When Return for Revision is selected, an email will pop-up. The subject and body of the email will be blank and should be completed with information from the form being returned and the reason the returning.

- **To:** The Requestor's name and email will be prefilled
 - **Only the form owner (requestor) can revise information on a form**
- **Subject:** enter 'Returned for Correction'
- **Body:** enter the reason for return, expected correction
- **Contact information:** enter your name and contact information so the requestor will know who is returning the form

See example Return for Revision email on next page

Return For Revision

This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form.

To

1: Requestor

From

Budget_forms@sfasu.edu

Subject

Returned for Correction

Body

Source

Please change the Transfer TO fund to our O&M fund.
Thanks,

John Smith
John.Smith@sfasu.edu
936.468.9999

Characters (including HTML): 0

Return this form for revision

Cancel and return to form

Select the appropriate action

Emails

The requestor will receive an email acknowledging the submission of the form. An email will also be sent once the form has been approved and Banner entries have been made.

Dynamic Forms User Portal

Located in mySFA – Finance – Budget & Finance

The screenshot displays the SFASU User Portal interface. At the top, a purple banner contains a document icon and the text "Dynamic Forms User Portal", with a "Click here" callout pointing to it. Below this, a "My Forms" dropdown menu is open, showing options: "SFASU User Portal", "Pending / Draft Forms" (highlighted), "Forms I'm Copied On", and "Form History" (highlighted). A callout points to the "Pending / Draft Forms" and "Form History" options, stating: "2 locations for Form History (completed forms) and Pending/Draft forms (forms in progress)". The main portal area is titled "SFASU User Portal" and features a header with the Stephen F. Austin State University logo and name. The interface is divided into several sections: "Assigned To Me" (0) with a search bar and a message "No assigned forms."; "Other Forms" (0) with a search bar and a list of forms including "Accounts Payable", "Purchase Voucher", "Payroll Services", "Payroll Reallocations", "Budget Office", and "Budget Transfers"; "Pending Action" (0) with a message "No pending forms." and a "View Forms History" link circled in red; and "Verification" with a message "You have no Verification tasks that require action." A callout points to the "Pending Action" section, stating: "Forms awaiting your action will be displayed here." Another callout points to the "View Forms History" link, stating: "Pending forms (forms in progress)". A third callout points to the "Form History" option in the dropdown menu, stating: "Forms History (completed forms)". A final callout points to the "Other Forms" section, stating: "Select the form to begin a new request."

Dynamic Forms User Portal

Click here

My Forms

SFASU User Portal

2 locations for Form History (completed forms) and Pending/Draft forms (forms in progress)

Assigned To Me 0

No assigned forms.

Forms awaiting your action will be displayed here.

Pending Action 0

No pending forms.

View Forms History

Pending forms (forms in progress)

Forms History (completed forms)

Select the form to begin a new request.

Other Forms 0

Search other forms...

Finance

Accounts Payable

Purchase Voucher

Payroll Services

Payroll Reallocations

Budget Office

Budget Transfers

Verification

You have no Verification tasks that require action.