Skyward Budget Transfer Entry – Updated 09.19.2011

Thank you very much for your patience. You may begin entering budget transfers, using the new system as described below, anytime you are ready. If you have any questions, please feel free to contact Cecy Delacruz, Justin Hill or myself. This new process will actually allow for budget transfers to be approved, by the appropriate person, much timelier and they will be approved based on the information you provide. Please remember we would like to approve transfers on Tuesday of each week.

(1) Budget Transfer Group is a new drop down menu. I have placed the drop down menue in the example for you. The system did not work exactly how I would have liked it to, but I think we can make it work. Your Budget Transfer Group selection should be based on the account number you are transfering <u>from</u>. *Example: Transfer from 199 E 11 6399 00 XXX 0 11 to 199 E 11 6399 00 XXX 0 30 – Select Budget Transfer Goup 013 (PIC 11 INSTRUCTION).* I believe the drop down options are self explanatory, but remember to make your selection based on the account number you are transfering <u>from</u>. The Group number does not reflect campus or department numbers. It is a Skyward number.

(2) All other processes are the same. Remember to change the fiscal year to 2011-2012 until the system automatically changes.

(3) The first description should be BT-XXX (XXX = Your campus or department organization number). This is not new process. Please feel free to add additional information after the required description for your use. This description will print on reports. The description under each account number should be placed in as much detail as possible. Detail will allow the budget transfer approver to make a timely and accurate decision about your request. *Example: To purchase supplemenal readingsupplies (workbooks)for reading classes.*