How to Process Budget Transfers

1) On the Budget Transfer page: enter the Transfer Amount, enter ‘1’ for Chart (not 01), input the two Index fields only (leave all other fields blank), enter a Description, leave the Budget Period as 01 (unless you know it needs to be changed), and hit Complete:

2) Hitting complete will auto-fill the associated Fund, Org & Program numbers (this is because the system will process the transfer based on those numbers and not the index number, but end-users can only be expected to know the index number. So the system is set up to validate the index in Step 1 and then the index number SHOULD NOT BE ENTERED AGAIN, otherwise it will keep running Step 1 over and over). The user should only input the two Account Codes and hit Complete again. This will result in a JV number for their reference.