Budget Transfer online form:
A beginner’s guide

This form is the process used when changing your budget on a current year (CY) basis. This change must be a balanced entry, and also must be entirely within a single fund code. The form is used to transfer budget authority between programs and/or accounts. It can be used to transfer budget authority to units outside of your own, with the help of your budget analyst. This form is accessed via Peoplesoft Financials.

Procedure for online BTR entry
1. Log into Peoplesoft and navigate to Main Menu -> Commitment Control -> Budget Transfers -> Enter Budget Transfers. On the Add a New Value tab, click the Add button.
   
   *Note: If you do not have access to add a journal, it will need to be requested by your lead fiscal officer via this form: [http://louisville.edu/provost/budget/forms/budgetaccess](http://louisville.edu/provost/budget/forms/budgetaccess).*

2. For the Ledger Group field, it will be one of two options, and these two cannot mix within a single transfer. Click magnifying glass, then either DIV_DET, or APPRP_DET based on:
   a. All Expense account codes (5xxxxx) on general funds (1000A, B, C, D, E, and 1010) will be under DIV_DET.
   b. All Expense account codes (5xxxxx) on non-general funds (those not in the above fund codes) will be under APPRP_DET.

3. Under the long description, it is preferred to use the unit VP abbreviation, then a very brief description. An example using the College of Business, “COB – salary transfer for Professor Smith.”
   
   *Note: You may want to copy the description entered for something later in the instructions.*

4. The Budget Period should be the current fiscal year. For Speedtype, put in the program number. This will populate fund, department, and program.

5. Fill out the account, which needs to reflect accounts used in a PI-03 type report. That is, the account needs to be specific. For example, 511000 is salary but not specific, whereas 511200 is salary – faculty, and is specific enough for the form. Keep tabbing to the right until you get to amount, in which you will enter the CY amount. After you finished with that line, click the box with the ‘+’ to add a line below. It will copy all information from the above line except for the original speedtype.
   
   *Note: You can also change the number to have it add several more lines instead of just one, which can be useful. I recommend no more than 10 lines at a time for scrolling purposes.*
6. Once all lines are entered, check the totals box such that total debits equal credits. If they do not, adjust the amounts so that they do. Then click Process (towards the top right), and Next (in the pop-up box). You should see the Budget Header Status change to Posted.
   a. **If there is an error**, please check the following:
      i. Ensure that all fund codes are the same.
      ii. Ensure that all account codes are at the detail level (e.g. 511200 instead of 511000).
      iii. Ensure all departments are within the VP (the first two digits of the department) for which you have access.
      iv. If the transfer is between two different VP’s, then click Save and use the ‘Notify’ feature (details explained in the next steps) to send to your budget analyst for posting. If this is the case, it is imperative that both sides agree to the transfer.

7. Once it says posted, click the Notify button at the bottom and it will pop up an email-like looking form.
   a. In the subject, this is typically where the long description from before is used. If you copied it, then paste it here.
   b. It’s usually easiest to use the Lookup Recipient link on the right for emails. So, fill out the ‘To’, which should be all those involved in the transfer.
   c. You may also cc yourself (typically recommended).
   d. If needed (though not usually), you can also add in another message in the Message box such as ‘Posted’ to let the recipients know it has been done (vs pending approval).

8. Clicking Ok will send the email and take you back to the entry page.

To refresh the page for entering a new journal, just click the Enter Budget Journals link at the top of the page at the end of the navigation line.