
Cross-Divisional Paper Budget Transfer

(Non-RSP Funds)

On occasion you may need to prepare a cross-divisional budget transfer due to the limitations set in your Banner Security. At least one person in each division has authority to make a budget transfer between departments within the division; however, only the Office of University Budgets can make a transfer between divisions. In this case, a paper budget transfer (BT) is required. Below are the steps necessary in preparing a cross-divisional BT that does **not** involve Research and Sponsored Programs (RSP) funds.

_____ Log into Banner and go to FGAJVCQ.

- Enter the information in the header section
- Enter the long text
- Enter the sequence(s) for which you have access
- Save
- Close so it remains in the Incomplete Status.

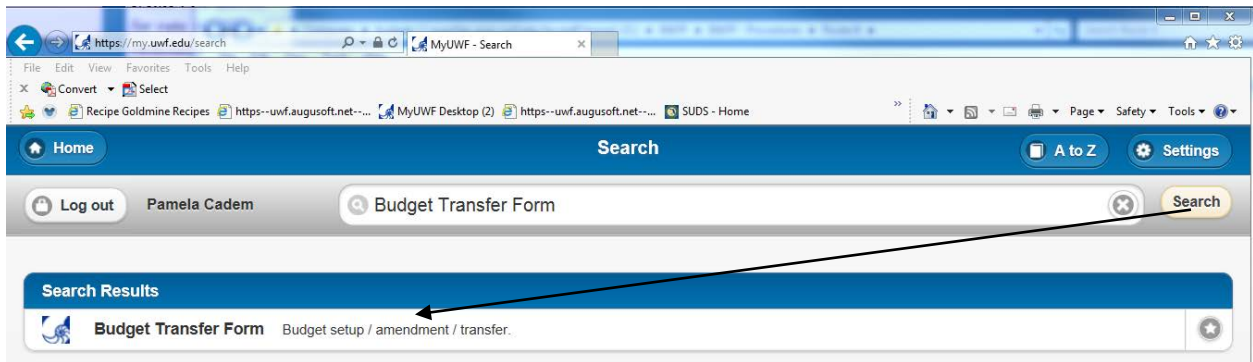
_____ Make note of the document number assigned to the budget transfer in Banner

_____ Go to MyUWF and log in. Then

_____ Type in Budget Transfer in the Search Area

_____ Select Search.

_____ Select Budget Transfer Form.



By selecting Budget Transfer Form you will get the following form:

THE UNIVERSITY OF WEST FLORIDA
Budget Setup / Amendment / Transfer

Action Type: Document No:

Initiating Department (Banner Index Code):

Phone: Rule Code: Date:

Sequence No.	Index Code	Banner Name	Activity Code (Optional)	Budget Category	Account Code (Optional)	Budget Amount	
						Increase Budget	Decrease Budget
1:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTALS						<input type="text" value="0"/>	<input type="text" value="0"/>

Add ADDITIONAL ROWS DOCUMENT TOTAL

ADDITIONAL COPIES TO:

REASON FOR TRANSFER (1500 character limit):

_____ Complete the form remembering to enter the document number that was assigned in Banner.

If you need more than the 10 lines displayed, enter the number of additional lines needed then select the Add button. This will open a new form with the information you already provided and have the additional lines displayed.

The screenshot shows a web form titled "THE UNIVERSITY OF WEST FLORIDA Budget Setup / Amendment / Transfer". The form includes the following fields and sections:

- Action Type:** Budget Transfer (dropdown)
- Document No.:** []
- Initiating Department (Banner Index Code):** []
- Phone:** []
- Rule Code:** []
- Date:** 03/05/2018
- Budget Amount Table:**

Sequence No.	Index Code	Banner Name	Activity Code (Optional)	Budget Category	Account Code (Optional)	Increase Budget	Decrease Budget
1:	[]	[]	[]	[]	[]	[]	[]
2:	[]	[]	[]	[]	[]	[]	[]
3:	[]	[]	[]	[]	[]	[]	[]
4:	[]	[]	[]	[]	[]	[]	[]
5:	[]	[]	[]	[]	[]	[]	[]
6:	[]	[]	[]	[]	[]	[]	[]
7:	[]	[]	[]	[]	[]	[]	[]
8:	[]	[]	[]	[]	[]	[]	[]
9:	[]	[]	[]	[]	[]	[]	[]
10:	[]	[]	[]	[]	[]	[]	[]
TOTALS						0	0
- Buttons:** Add, ADDITIONAL ROWS, DOCUMENT TOTAL [0]
- REASON FOR TRANSFER (1500 character limit):** []
- Footer Buttons:** Reset, Finish, Launch JIRA

Once you have completed the form:

_____ Select Finish to download the pdf. This will open the following:

_____Select Launch JIRA and the following form will pop up. **Remember this is for funds that do not go through Research and Sponsored Programs.**



UWF Service Desks / Budget

Budget Transfer

Before beginning, please ensure that you have filled out a [budget request form](#). That form **must** be provided as an attachment to this request.

Raise this request on behalf of

Pamela Cadem ▼

Budget Transfer No. (BT#)

Please enter your Budget Transfer Number here. This number comes from Step 1 of [Creating and Submitting a Cross-Divisional Budget Transfer \(BT\) Form](#)

Approvers

Please list the name(s) of the users who must approve this transfer. If you are the Approver, please list your own username here.

[To view the listing of Division Budget Managers, who usually act as the Approver, click here.](#)

Notes (optional)

Please use this box for submitting additional notes that should accompany your request, if any.

Attachment

Drag and drop files, paste screenshots, or [browse](#)

Please attach your completed budget request form. This is a required field to move the JIRA ticket forward.

Create

Cancel

_____Complete the JIRA Budget Transfer form:

_____In the Approvers section enter all approvers needed, including yourself if you are an approver. Remember the same approvers for electronic budget transfers must approve paper

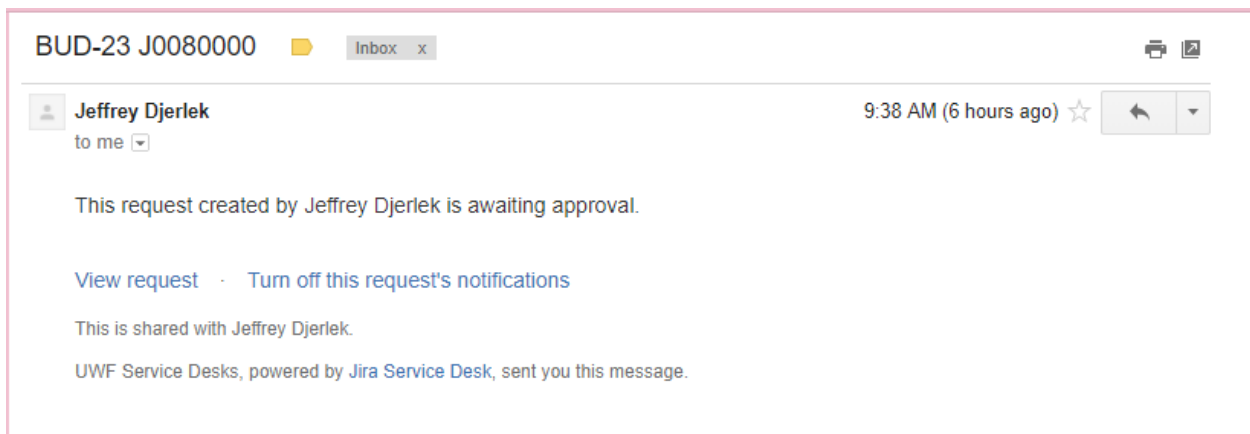
budget transfers. If you are unsure who the approvers are, select the click here to the right of the approvers for a list of the approvers for each division. You do not need to enter anyone from the budget office because as soon as all other approvers have approved, the JIRA is automatically sent to budgets@uwf.edu.

_____ In the Notes section enter any comments you feel may be helpful or needed. (Optional)

_____ In the Attachments section attach the Budget Transfer document that you downloaded. You may also add additional documentation if you need to by selecting Browse to find the document you want to add. (Note: For audit purposes, departments are responsible for retaining all original and supporting source documents.)

_____ Select Create

Recipient of Budget Transfer JIRA -you will get an email stating that there is a document to review. The email similar to this:



Note: The final recipient for non-RSP paper budget transfers is the University Budgets.

Upon final approval you will get an email similar to this:

From: Budget <jira@uwf.edu>
Date: Wed, Feb 28, 2018 at 3:21 PM
Subject: BUD-24 Financial Plan Request
To: jdjerlek@uwf.edu

Jeffrey Djerlek changed the status to Done.

Jeffrey Djerlek resolved this as Done.

[View request](#) · [Turn off this request's notifications](#)

This is shared with Jeffrey Djerlek.

UWF Service Desks, powered by [Jira Service Desk](#), sent you this message.

If you determine at some point, that you do not need to complete the document, remember go back to FGAJVCQ in Banner and change amounts to zero, remove the long text, then email budgets@uwf.edu that you will not be using the document number so we can use it for another transaction.