

## BUDGET TRANSFERS

### Steps to Budget Transfers

1. Go to Skyward Finance.
2. Click on Account Management.
3. On the right hand side, click on "Submit Transfers".
4. Click the button on the right side that says "ADD".
5. Scroll down to "Description", right below the fiscal year.
6. Type in the box, "Funds moved from (Acct. # ) to (Acct. # )
7. Scroll down to the box that reads "Detail Budget Transfer"
8. Key in the account number you are going to transfer money from (Make sure that account has enough money for a transfer). Key in the amount on the right hand side where it reads , "Transfer Amount".
9. Click on the highlighted blue area, and the account number will show up in the box where you are going to transfer from.
10. Fill in the description area. (See example page).
11. Key in the account number you are going to transfer the money to and repeat the same process . Click on highlighted blue area, and the account number you are going to transfer to will show up in the box. Click on "Transfer To" and key in the amount you will be transferring where it reads "Transfer Amount". Both debit amounts should match or you will not be able to submit for approval.
12. Fill in the description area (See Example page).
13. Now you are ready to submit to the next level, which is the administrator/principal.
14. In a couple of days more or less you can check to see if your transfer went through.
15. You need three approvals for Budget Transfers. The Principal, Christy Gonzales, & Mr. Pineda.
16. You will receive the completion/approval of the budget transfer through your e-mail.
17. All budget transfers must be done with the same function number.
18. If you do not have enough funds in the account you are trying to transfer money from, it will not allow you to submit for approval.

### Budget Transfers

**Budget Transfers**

\* Budget Transfer Group:

\* Fiscal Year:

\* Transfer Type:  [Rules](#) \* Batch Number:

\* Description:

Amount:

[Submit for approval](#)

[Save and finish later](#)

[Back](#)

**Budget Transfer Detail Lines**

**Detail Budget Transfer**

General Ledger Account Transfer Amount

Account:  Transfer From

\* Description:  Debit Amount  Credit Amount

**Detail Budget Transfer**

General Ledger Account Transfer Amount

Account:  Transfer To

\* Description:  Debit Amount  Credit Amount

**Detail Budget Transfer**

General Ledger Account Transfer Amount

Account:  Transfer From

\* Description:  Debit Amount  Credit Amount

**Detail Budget Transfer**

General Ledger Account Transfer Amount

Asterisk (\*) denotes a required field