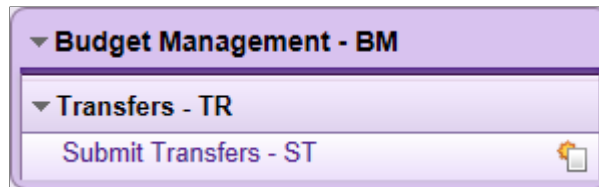


Submit Budget Transfers

Skyward Financial Management \ Account Management \ Budget Management \ Transfers \ Submit Transfers

Budget data for Expenditure accounts can be transferred using the **Submit Transfers** menu option. This method of Budget Transfer processing is ideal for decentralizing budget management transfer requests entered by Building and Department staff. It allows the user to fine-tune their budget by moving funds from one Account Code to another without altering the Original Budget.

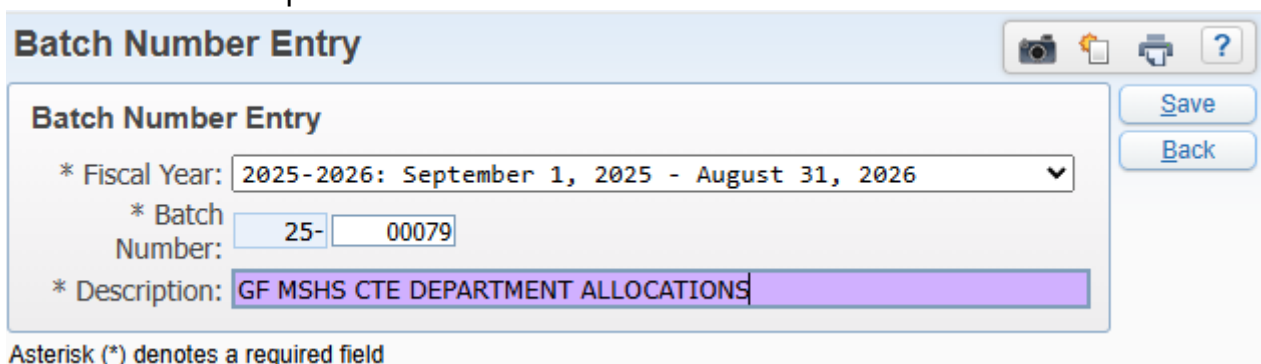


1. To create a Budget Transfer transaction click **Add**.



2. In the **Budget Transfers** section:

- Select the **Budget Transfer Group**
- Select the **Fiscal Year**
- Confirm **Transfer Type** – Expense
- Enter a **Description** – Should start with Fund and then School acronym (GF MSHS) and then short description.



The screenshot shows the "Batch Number Entry" form. The form has a title bar with "Batch Number Entry" and icons for "Save", "Back", and a help icon. The form contains three required fields, each marked with an asterisk (*):

- * Fiscal Year: 2025-2026: September 1, 2025 - August 31, 2026
- * Batch Number: 25- 00079
- * Description: GF MSHS CTE DEPARTMENT ALLOCATIONS

Below the form, a note states: "Asterisk (*) denotes a required field".

3. In the **Budget Transfer Detail Lines** section

- Begin typing the **Account** number or click the Account link to scroll, page or search the list of available account codes, (10 E 530 3151 21 5610 2850 9000 3051 0)
- Select **Transfer From** or **Transfer To**. Transfer To = Debit, Transfer From = Credit You'll need at least one of each on two separate Budget Transfer Detail Lines to have a balanced transaction.
- Enter **Transfer Amount**
- Enter a **Description** reason for the transfer

The screenshot displays the 'Budget Transfer Detail Lines' section with four detail budget transfer entries. Each entry includes a 'General Ledger Account' field, an 'Account' dropdown menu, a '* Description:' text area, and a table for 'Transfer Amount' with 'Debit Amount' and 'Credit Amount' columns. The first entry shows a 'Transfer From' of 1.00. The second entry shows a 'Transfer To' of 1.00. The third and fourth entries show zero values for both debit and credit amounts. A note at the bottom states: 'Asterisk (*) denotes a required field'.

4. Click **Submit for approval** when all of the transaction entries are finished and is balanced.

The screenshot shows the 'Budget Transfers' screen. At the top, there are fields for 'Budget Transfer Group' (100 Business Services), '* Fiscal Year' (2013 - 2014), '* Transfer Type' (Expense), '* Batch Number' (120513SK), and '* Description' (BUDGET TRANSFER GENERIC DESCRIPTION). Below these is the 'Budget Transfer Detail Lines' section, which contains three detail budget transfer entries. The first entry shows a 'Transfer From' of 2.00, and the second and third entries show a 'Transfer To' of 1.00. On the right side of the screen, there are four buttons: 'Submit for approval' (highlighted with a red box), 'Save and finish later', 'Back', and a question mark icon.

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