



Budget Transfer in Self Service Banner (SSB)

1. Click on **Budget Transfer** from the Finance menu
2. Transaction date will default to current date
3. Choose Journal Type of **BUD** (Departmental Budget Adjustment) from pull down menu
4. Enter amount to be transferred
5. Enter Chart **C** (always chart C)
6. Enter **Index** and click **complete** (Fund, org and program will populate but Index will disappear)
 - If you do not know your Index you can do a code lookup
 - Chart of Accounts code = C
 - Type – use pull down and select index
 - Skip Code Criteria
 - Title Criteria = enter query for your department name (example %Finance% will pull up anything with finance in the name)
 - Code lookup result will display near top on page
7. Enter **Account code** number (Transfer from pool to pool except Athl) Can not transfer from/to utilities or salaries
 - 7100 – Supplies & Services
 - 7200 – Goods & Services
 - 7300 – Travel
 - 7500 – Scholarship
 - 7600 – Capital acquisitions
 - 7900 – Other Expenses
8. Copy Fund, Org and Program to next line and enter Account you are transferring to
9. Enter reason for transfer under description
10. Leave Budget period at 01
11. Click complete