

How to Submit a Budget Transfer (Change) on Skyward

Business Office



STEPS ON SKYWARD FINANCE

1. Log in to Skyward Finance
2. Budget Management –BM
3. Click on Transfers – TR
4. Click on Submit Transfers - ST
5. Click Add
6. Budget Transfers Sheet will pop up
 - a. Budget Transfer Group – Make sure you select the campus you inputting for
 - b. Fiscal Year – Make sure fiscal year is current year (2016-2017)
 - c. Transfer Type – Make sure “Expense” is selected
 - d. Description – Type in a Detailed explanation of why you are requesting a BT
 - e. Amount – Leave the amount blank
7. Budget Transfer Detail Lines is Next
 - a. Select Account that you are taking from
 - i. Type a Description of that account purpose
 - b. Select “Transfer From” Drop Down and input the amount you are transferring
 - i. Credit will automatically take place
8. Follow the same steps for the following box and input the account and data to transfer into. Make sure to change the “Transfer From” drop down to “Transfer To”.
 - i. Debit will automatically take place
9. Click “Submit for Approval” or “Save and Finish Later”
10. REVIEW Your Work!!!!

Account Master - CA

- Chart of Accounts - CA

Budget Management - BM

Transfers - TR

- Submit Transfers - ST
- Approvals - AP
- Activity - AC
- Transfers - TR



Click on Submit Transfers under the Account Management Tab

Recent Programs

- Financial Management Home WF
- Chart of Accounts WF\AM\CA\CA
- Submit Transfers WF\AM\BM\TR\ST\ST
- Requisitions WF\PU\MR\RE\RQ
- View My Purchase Orders WF\PU\VO\VO

Calendar Events

Not available when logged into the Secured Access Area

Safe Labor Day



Views: General Filters: *All

- *All
- *Batch
- *Denied
- *History
- *Submitted
- *WIP (Work in Progress)

Create Date	BT Group	S	Debit Amount	Credit Amount	Net Amount	Entered by
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There are no records to display; ch

Click Add to get to Workbook

Refresh

Add

Edit

Submit

Notes

Attach

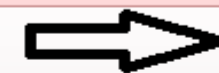
Data Retention on Add



Within the Drop Down, you are able to see a variety of your work throughout the school year.

Budget Transfers

After all data is inputted, click Submit for Approval or Save and Finish Later if Worksheet is not complete



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Budget Transfers

* Budget Transfer Group:

* Fiscal Year:

* Transfer Type: [Rules](#)

* Description:

Amount:

* Batch Number:

Budget Transfer Detail Lines

Detail Budget Transfer

General Ledger Account

Account: \$

* Description:

Transfer From		Transfer Amount
Debit Amount	Credit Amount	
0.00	100.00	

Detail Budget Transfer

General Ledger Account

Account: \$

* Description:

Transfer To		Transfer Amount
Debit Amount	Credit Amount	
100.00	0.00	

Detail Budget Transfer

General Ledger Account

Account:

* Description:

Transfer From		Transfer Amount
Debit Amount	Credit Amount	
0.00	0.00	

Detail Budget Transfer

General Ledger Account

Transfer Amount

Asterisk (*) denotes a required field

AFTER SUBMITTED

- Once the Budget Transfer is submitted for approval, the principal/director will receive a notification through email.
- Once approved by the principal/director, the business office will receive the request for final approval.
- Once approved by the Business Office, funds will automatically be transferred.

Contact Us

Please contact the business office if you have any questions or concerns.
Thank you!

361-767-6600 Ext. 2030

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