Budget Office Training

My Finance Self-Service

Multiple Line Budget Transfer
(Budget Change or BD04)

Multiple Line Budget Transfers: Correct Ways to Use

* Purpose: Allows you to submit a **budget** change to move Accounted Budget amounts. You will see it in the Accounted Budget column.
* Other names: Budget Change or BD04
* This function can only be used to move **budgeted** funds:

  1. Within the SAME org number.

  Example: From Org 123456/Fund 12345/Account Code 7000-Operating
  To Org 123456/Fund 12345/Account Code 8100-Equipment

  2. Between 2 different orgs that have the same 5-digit Fund Number.

  Example: From Org 123456/Fund 12345/Account Code 7000-Operating
  To Org 654321/Fund 12345/Account Code 7000-Operating

  -If the 2 orgs have a different fund number, you cannot use a Multiple Line Budget Transfer.

My UAH

Home

Home Community / **Home**

myUAH

- ☰ **Home**
- ☆ **Student Affairs**
- ◫ **Academics**

Mode of Instru

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Employee Services

Huron UAH Enrollment Management Plan (Final-Revised 12-5-13)

Self Service Main Pages

Employee

Finance ⬅

Personal Information

Payroll Self Service

Timesheets

Pay Stubs

Leave Balances

Human Resources

HR Connection

New Employee Training

From the UAH webpage, log in to My UAH. Scroll down to Employee Services on the far right of the screen. Select Finance from Self Service Main Pages.
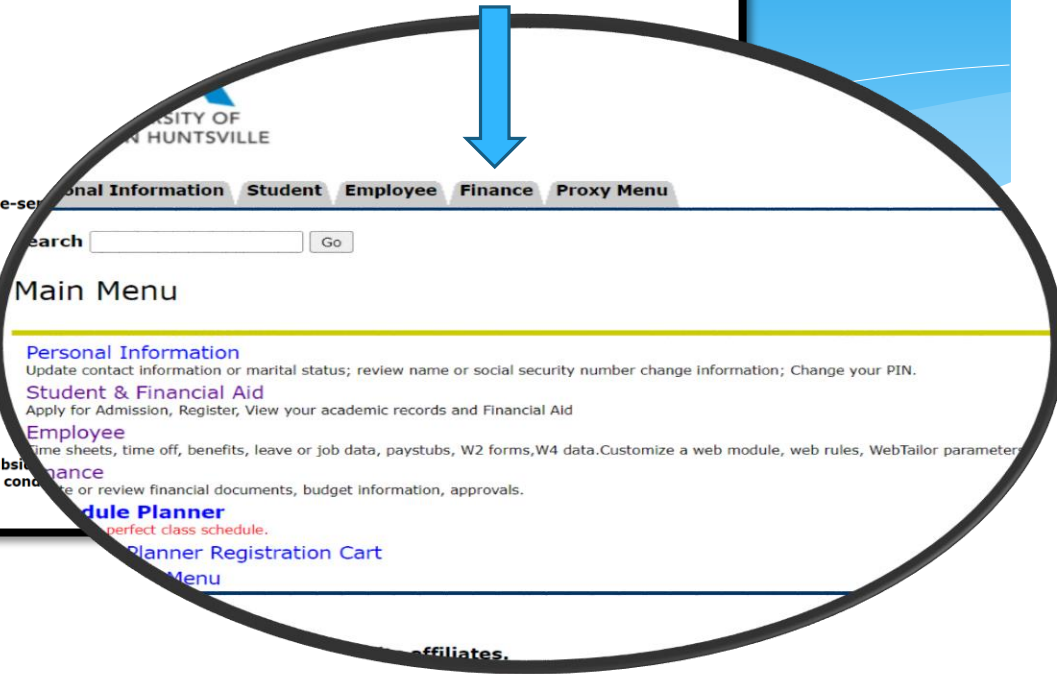
Banner Self-Service Main Screen

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ALABAMA IN HUNTSVILLE

Please Note: User IDs, passwords, and security question answers are all case-ser

Enter Secure Area
Prospective Students
Apply for Admission
Class Schedule
Course Catalog
Transfer Credit Equivalency Table
Proxy Access Login

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Personal Information   Student   Employee   Finance   Proxy Menu

Search [   ] Go

Main Menu

Personal Information
Update contact information or marital status; review name or social security number change information; Change your PIN.

Student & Financial Aid
Apply for Admission, Register, View your academic records and Financial Aid

Employee
Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data. Customize a web module, web rules, WebTailor parameters

Finance
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perfect class schedule.

Planner Registration Cart
Menu

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1. **Select Enter Secure Area.**
2. **Select the Finance Tab.**
3. **Select Multiple Line Budget Transfer**

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Personal Information   Student   Employee   Finance   Proxy Menu

Search [   ] Go

RETURN TO MENU   SITE MAP   HELP   EXIT

Finance

Budget Queries
Encumbrance Query
Requisition
Approve Documents
View Document
Multiple Line Budget Transfers
Budget Development
e~Print Repository
ARRA Certification

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Multiple Line Budget Transfers | Budget Development | e~Print Repository | ARRA Certification]

Multiple Line Budget Transfer Form

Instructions:

1. **Transaction date will auto-populate to current date.**
2. **Journal Type defaults to BD04 (Temporary Budget Adjustment).**
3. **'Document Amount' will equal the absolute value of all entries.**

*In the upcoming example, if you subtract $5,000 from 235411-7801 and add $5,000 to 235411-7000, the 'Document Amount' will be $10,000.

Note: Do NOT insert Dollar Sign or Commas for the dollar amounts-only numbers.

Multiple Line Budget Transfer Form

Multiple Line Budget Transfer Form

Begin by creating a multiple line budget transfer or retrieving an existing template. If available budget exists, budget can be transferred

Choose Complete to perform a validation and forward the document for processing.

Use Code Lookup to query a list of available values.

Use template None [Retrieve]

Transaction Date 27 ∨ JUN ∨ 2022 ∨
Journal Type BD04 (Temporary Budget Adjustment) ∨
Document Amount 10000

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H	235411			7801				5000	- ∨
2	H	235411			7000				5000	+ ∨
3										+ ∨
4										+ ∨
5										+ ∨

Description Align funds to operating   **Budget Period** 09 ∨

Save as Template
☐ **Shared**
[Complete]

Instructions:
4. Enter '**H**' for Chart of Accounts.
5. Enter the 6-digit '**Index**' in each of the boxes.
6. Enter the 4-digit '**Account Code**' that you are reducing (Minus '-' sign is auto-populated) on the first line, the '**Amount**'.
7. Enter the 4-digit '**Account Code**' that you are increasing (the '+' sign will be auto-populated under '**D/C**') on the second line with the '**Amount**'.
8. Repeat as needed making sure that total increases equal total decreases.
9. Add a brief '**Description**'.
10. Add the appropriate '**Budget Period**' for the Transaction Date (i.e. 1=October, 2=November, 3=December, etc.)

Multiple Line Budget Transfer Form

Instructions:

11. Once all items have been entered, click '**Complete**'.
12. If entered correctly, **4 things** should happen:
    - The '**Index**' number will move to the Organization field.
    - The Default '**Fund Number**' will auto-populate.
    - The '**Account Codes**' will disappear.
    - The Default '**Program Codes**' will auto-populate.

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Use template None — Retrieve

Transaction Date 27 / JUN / 2022
Journal Type BD04 (Temporary Budget Adjustment)
Document Amount 10000

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H	235411			7801				5000	-
2	H	235411			7000				5000	+
3										+
4										+
5										+

Description Align funds to operating   **Budget Period** 09

Save as Template ___
☐ **Shared**
Complete

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Begin by creating a multiple line budget transfer or retrieving an existing template. If available budget exists, budget can be transferre

Choose Complete to perform a validation and forward the document for processing.

Use Code Lookup to query a list of available values.

Use template None — Retrieve

Transaction Date 27 / JUN / 2022
Journal Type BD04 (Temporary Budget Adjustment)
Document Amount 10000

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H		19200	235411	7801	20			5000	-
2	H		19200	235411	7000	20			5000	+
3										+
4										+
5										+

Description Align funds to operating   **Budget Period** 09

Save as Template ___
☐ **Shared**
Complete

Multiple Line Budget Transfer Common Errors

- **Insufficient Budget** – The Org/Fund/Account code that you are trying to decrease does not have sufficient funds to process the transaction. Check the budget on that line to make sure there is enough money in the specific account code you are trying to decrease. Also, check 'Pending Documents' on the Org that could be causing the error.

- The 'Budget Status by Organizational Hierarchy' query is a good way to quickly identify if there is a deficit in an account code series. Refer to https://www.uah.edu/budget/self-service-help

- **Insufficient Privileges** – If you receive this error, you are not authorized to 'Post' on the specified Org # or #s. You may need to request access from the Budget Office via the Banner Self-Service Request form. https://www.uah.edu/budget/forms

Please note:
If you contact the Budget Office to report a problem, please email a screenshot of the error (Ctrl + Print Screen).

Questions?

Contact us!
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Tammy Haymon: tgh0008@uah.edu; Ext 2242