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

<table>
<thead>
<tr>
<th>#</th>
<th>Chart</th>
<th>Index</th>
<th>Fund</th>
<th>Organization Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Amount</th>
<th>D/C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>H</td>
<td>235411</td>
<td>19200</td>
<td>235411</td>
<td>20</td>
<td>5000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>H</td>
<td>235411</td>
<td>7801</td>
<td>7000</td>
<td>8000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save as Template
- Shared
- Complete
Instructions:
13. Re-enter the appropriate ‘Account’ codes.
14. Click ‘Complete’ again.
15. If the entry is accepted, an 8-digit Journal Entry Number (Jxxxxxxx) at the top of the screen.
16. You can then find the entry in View Document or ‘Pending Documents’ in the Budget Query.
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!
Melissa Brown: mab0063@uah.edu; Ext 5217
Tammy Haymon: tgh0008@uah.edu; Ext 2242