Budget Transfer in Banner Self Service

The finance Self-Service Budget Transfer form allows a user to process Budget Adjustment Journal Vouchers on the web. This form enables the web user to transfer budget dollars from one FOAPAL to another.

Open an internet browser. From the Lafayette Home page, select the Offices & Resources link at the top right, and locate the Banner Self-Service link in the left hand column.

At the login screen, enter the user name and password that you use to log into your computer.

Once you are logged in, the screen will be personalized to you. Each person may see different things, depending on what they have permission to do in Self Service. Most employees will see three menus: the Personal Information section, where you can do things like change your password; the Employee section, from which you can access copies of your paystubs and W-2s; and the Finance section, where we’ll find the Budget Transfer form.
Follow these steps to complete a budget transfer.

1. Click on **Budget Transfer** from the Finance menu to navigate to the Budget Transfer page.
2. Choose whether you want this adjustment to be permanent or temporary. Temporary budget adjustments will only be for the current fiscal year; they will revert back once the new fiscal year starts.
3. Indicate the dollar amount you want to transfer.
4. Fill in the Chart of Account as “L” and the applicable Fund, Organization, Account and Program codes from and to which to move budget money. Note that if you prefer, you can enter the Org code in the Index field and upon pressing the **Complete** button, it should populate the Fund, Org, and Program Code for an operating budget account (100100 and 100200 funds).
5. Fill in a short description of why the transfer is occurring in the **Description** field.
6. Click the **Complete** button to execute your budget transfer.

**Additional Notes:**

- Budget allocation adjustments can only be made within the same fund. You cannot transfer budget dollars from one Fund code to another. You can move money between Orgs or between Account Codes within the same Org.
- Only individuals with security permission to post a transaction to both Funds and Orgs on the form (to and from) can successfully complete the form.
- The applicable Department heads as well as the Controller’s Office must approve any Budget Transfer prior to their being finalized.
- You can track where a Budget Transfer is in the review process by using the **View Document** function and then **Approval History**.