MUNIS Budget Transfer Request

Hampton City Schools Cheat Sheet

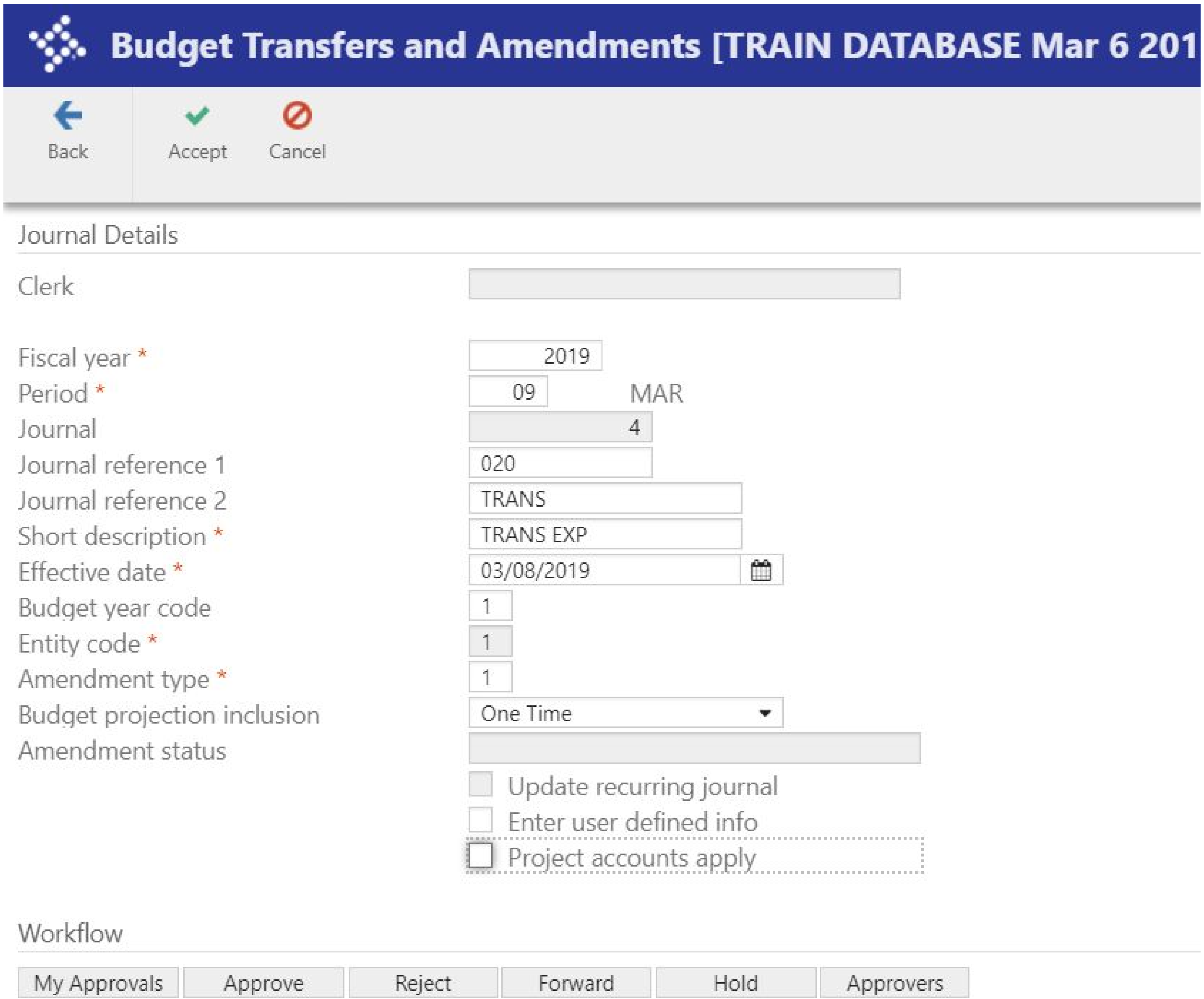
USE CHROME WEB BROWSER ONLY

Budget Transfers are not to be used to pay Department Invoices such as Print Shop, Graphics and Transportation. Those will still be processed by sending an email to Lisa Deanhofer.

To create a Budget Transfer

- **Open the Tyler Menu**
- **Financials**
- **Budget Processing**
- **Budget Transfers and Amendments (Add to Favorites)**

Click **ADD** on the ribbon to create the Transfer request.

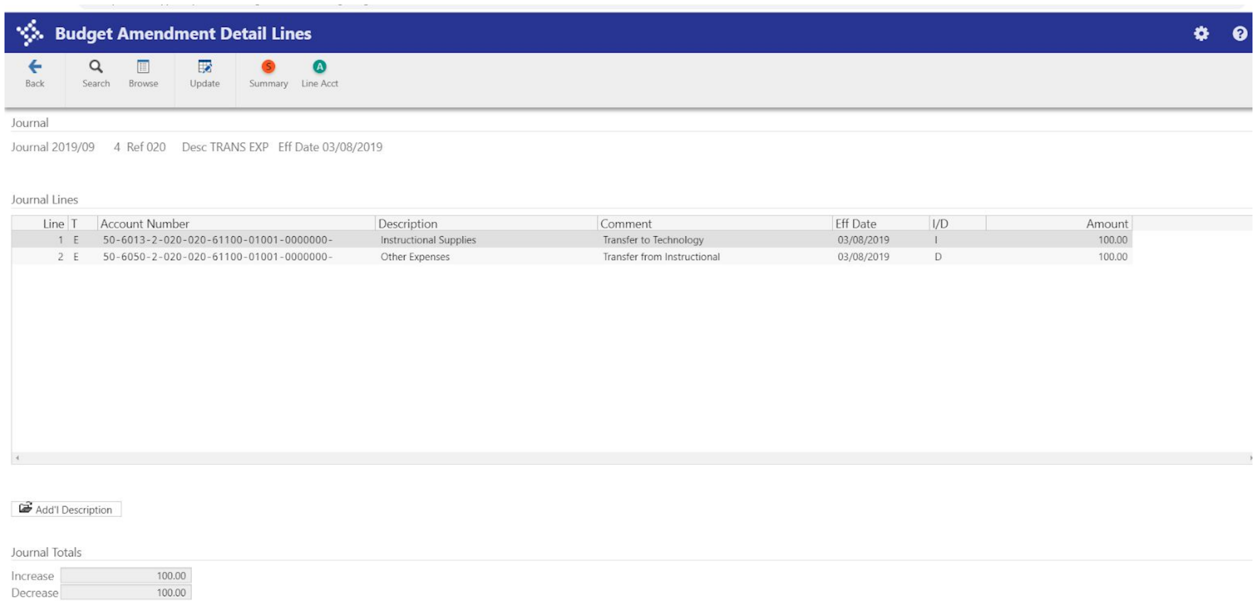


Fiscal Year	Will default
Period	Will Default
Journal Reference 1	Enter the Department Number
Journal Reference 2	**TECH** OR TRANS
Short Description	TRANS EXP
Effective Date	Will default to current date
Budget Year Code	Default ALWAYS 1
Entity Code	Will Default and cannot change
Amendment Type	Default ALWAYS 1
Budget Projection Inclusion	**ALWAYS ONE TIME**
Project Accounts Apply	**UNCHECK** if box is checked

If the budget transfer is for technology TECH should be entered in Journal Reference 2 in place of TRANS. If TECH is not included the budget transfer will automatically be denied.

Click ACCEPT to start the entry.

The cursor will go directly to the FIRST line to be entered.



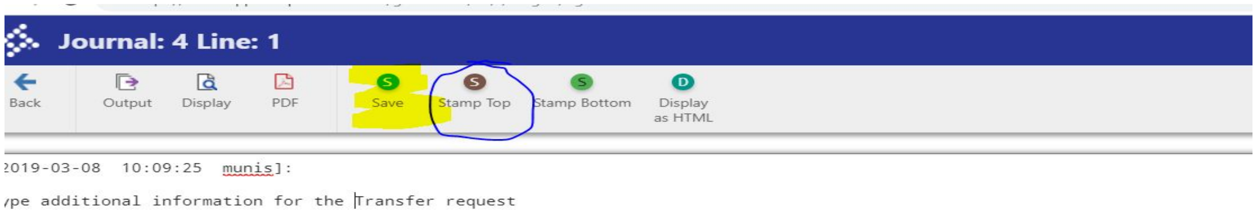
Line	1 Will default do not change.
T	E for Expense will default.
Account Number	Use the Lookup (3 dots at end of Account #) or to narrow your search you can type any of the account segments and then the lookup.
Description	Will autofill the account description.
Comment	Enter additional information for the approvers. This should include reason for transfer (not just increasing or decreasing a line). If this is a transfer for a technology purchase, enter a description of what is being purchased (Ex. Printer, USB Drive)
Effective Date	Will default-DO NOT CHANGE
I/D	**I** for **INCREASE** - Use for budget account being increased. **D** for **DECREASE** - Use for budget account being decreased.
Amount	Enter the amount of the transfer request.

Note: After entering first line, tab to enter the additional line of the transfer. The account number defaults from the line above. You can change the account number manually or you can clear out the entire account and select the account from the pick list.

You can enter as many transfer lines as needed or if you want separate entries that can be approved separately select **ACCEPT** in the top ribbon, then select **ADD** to get a new entry screen.

IMPORTANT NOTE: All lines of the transfer must be in **whole dollars only**. All budget transfers must be balanced. Make sure you have a balanced transfer by looking at the bottom left of the screen under **Journal Totals.** **Please note that the only cross category budget transfers allowed are for Technology purchases**. Any other cross category transfer requests will be denied. The only exception to this rule is for grant transfers.

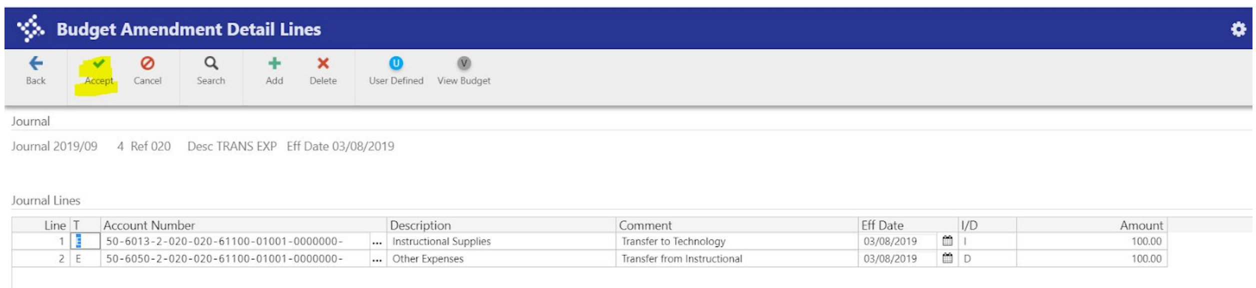
If you need to provide additional details about your transfer, you can do so by clicking on the **Additional Description Button** on lower left of the screen.



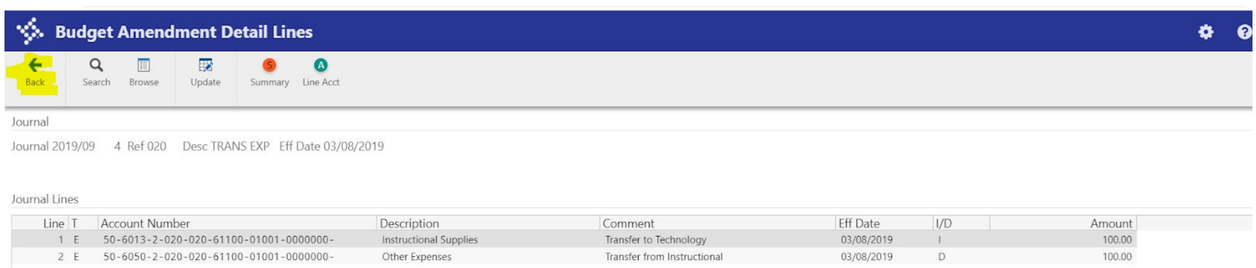
Select **Stamp Top** on the top ribbon which will input the date and user ID.
Type additional information then **SAVE** on the top ribbon.

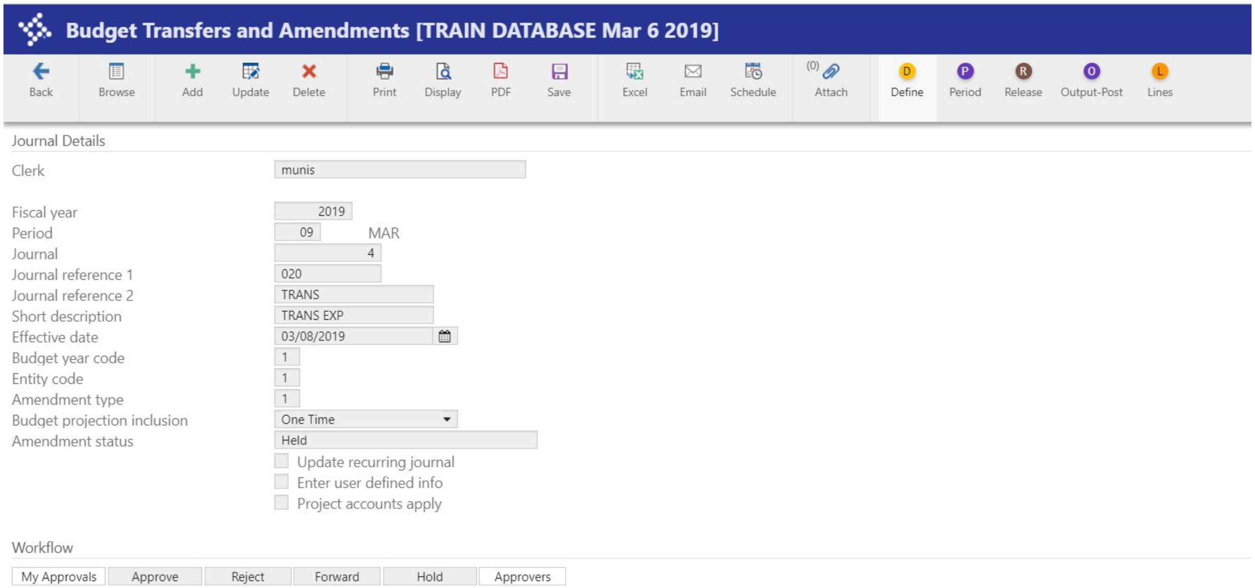
Click **Back** on the top ribbon to go back to the Transfer Screen.

When finished with entry select **ACCEPT** on the top ribbon.

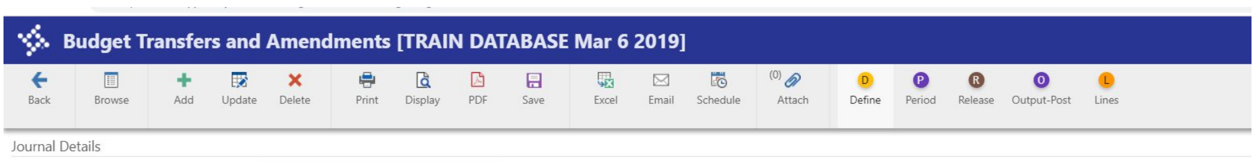


Then select **BACK** in the top ribbon to go back to the header record.





Select **RELEASE** on the top ribbon to release the transfer request into workflow.



The approvers will post this transfer request after approval.

To check the status of your Budget Transfer, go back to **Budget Transfers and Amendments** on your Tyler Menu.

Select **Browse** on the top ribbon.
Choose an option to search by and select **Accept** on the top ribbon.
Double click on the appropriate record.
At the bottom of the screen under **Workflow**, select **Approvers**. This will show the next approver in the workflow.