

## Budget Department Revenue (BDR)

- ❖ This type of Budget Transfer is used when a department needs to recognize revenue in a revenue producing FOAP (i.e. recognize \$1,000 of overrealized income from Retail Sales (55000) to O&M (72B0) and Travel (71B1).
- ❖ Revenue budgets are based on projected income and should be reviewed periodically to ensure estimates are being met. It may be necessary to increase/decrease the budget if receipts are more/less than expected.
- ❖ Revenue recognition equal to or greater than \$10,000 must be completed through a Banner Budget Transfer form, found on the Budget Office Website:  
<http://www.sfasu.edu/vpfa/documents/banner-budget-transfer-form.pdf>.

1. Log in to **mySFA**, choose the “**myServices**” tab, and click “**Self-Service Banner**”

The screenshot shows the mySFA website interface. At the top, there are navigation tabs: myNews, myCourses, myServices (highlighted), myEvents, and Course Evaluations and Surveys. Below the tabs is a main menu with a left sidebar and a main content area. The left sidebar lists various services under the heading "Student Services", including Academic Advising, Active Student Organization Registration Form, AlcoholEdu, Assessment/Testing Center, Business Office, Campus Alert System, Campus ID Lookup, Campus Wireless Locations, Career Services, and Counseling Services. The main content area is titled "Self-Service Banner" and has a red arrow pointing to it. Below this title are links for JackText, Personal Information, and Course Evaluations, Surveys, Elections. There are two columns of links: "Students" and "Employees". The "Students" column includes: Registration, Account Information, Direct Deposit, Grades, Transcripts, Financial Aid, and Short-term/Book Loans. The "Employees" column includes: Faculty/Advisor Functions, Electronic Personnel Action Form, Employee Information, Payroll (as of 1/1/2011), Leave Reporting, and Finance/Budget Information.

2. In the Main Menu screen, choose “**Finance**”

## Main Menu

### JackText

Sign up for text messages for grades, billing, extracurricular activities, & more

### Personal Information

Take a survey, view and update addresses and phones, view e-mail addresses, view and update emergency contacts, view name and social security number change information

### Student

Register, View your academic records, Check your Admission Status.

### Financial Aid

Apply for Financial Aid; View financial aid status and eligibility, accept award offers, and view loan applications.

### Employee

Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

### Finance

Create or review financial documents, budget information, approvals.

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**RELEASE: 8.5.1**

3. In the Finance Menu, choose “**Budget Transfer**”

## Finance

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4. Begin entering your Budget Transfer data. We will use the \$1,000 recognition of revenue to increase O&M budget as an example in the screen shot below.

- Transaction Date: Automatically defaults to today’s date
- Journal Type: BDR
- Transfer Amount: Desired transfer amount
- Enter “From” and “To” information (see detail below)

- Description: Brief description of the reason for the transfer (i.e. Recognize overrealized income or increase budget to reflect actuals)
- Budget Period: 01
- Enter Template Name to save as a template, if desired.
- Do not check “Shared”
- Click “Complete”

## Budget Transfer

Begin by creating a budget transfer or retrieving an existing template. If available budget exists, budget can be transferred from only one set of accounting elements to another within the same chart.

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

Use Code Lookup to query a list of available values.

Use template:

Transaction Date: 26 AUG 2013

Journal Type: BDR (Budget Department Revenue)

Transfer Amount: 1000

Document Amount: 0.00

	Chart	Index	Fund	Organization	Account	Program	Activity	Location	D/C
From	S		150010	XXXXX	55000	R99			-
To			150010	XXXXX	7280	100			+

Description: Recognize overrealized income      Budget Period: 01

- Enter “S” in the “Chart” field
- Enter Fund, Org, and Revenue Account Code (5XXXX). Program should always be R99.
- Leave “Activity” & “Location” fields blank

- Enter Fund, Org, Account, and Program you wish to transfer “to”
- Leave “Activity” & “Location” fields blank

Always 01

Save as Template:

Shared

Code Lookup

Chart of Accounts Code: S

Type: account

Code Criteria:

Title Criteria:

Maximum rows to return: 10

- Once the transfer is complete, a message should appear at the top of the screen that reads “Document JXXXXXXX completed and forwarded to the approval process”
  - If you do not see this message, your transfer has not been completed.

## Budget Transfer

Begin by creating a budget transfer or retrieving an existing template. If available budget exists, budget can be transferred from only one set of accounting elements to another within the same chart.

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

Use Code Lookup to query a list of available values.

✔ Document J0001865 completed and forwarded to the approval process.

[Another Transfer](#)