

# BUDGET TRANSFERS & AMENDMENTS

1. Choose Tyler Menu – Departmental Functions – Budget Transfers and Amendments

## Birdville Independent School District - PROD

39 Approvals  1 Notifications  0 Alerts

### Tyler Menu

- ▼ Munis
  - > Financials
  - > Human Capital Management
  - > General Revenues
  - > Asset Maintenance
  - ▼ Departmental Functions
    - Account Inquiry
    - YTD Budget Report
    - Vendor Inquiry
    - Purchase Order Inquiry
    - Employee Inquiry
    - Next Year Budget Entry
    - Requisition Entry
    - Budget Transfers and Amendments**
    - Requisition Approvals
    - Commodity Codes
    - Position Inquiry
    - Job Class Inquiry
    - Time Entry

### Favorites

Recent Activity

- Account Inquiry
- Budget Transfers and Amendments
- Requisition Entry (2)
- Purchase Card Statements
- Requisition Approvals (2)
- Employee Inquiry (3)
- Employee Job/Salary
- Receipts
- Vendor Central
- Miscellaneous Cash Receipts Export

Departmental Functions

- Budget Transfers and Amendments
- Account Inquiry
- Workflow Assistant

2. Choose Add

## Budget Transfers and Amendments [BIRDVILLE ISD]

← Back 📄 Browse **+** Add 🔄 Update ✖ Delete 🖨 Print 🔍 Display 📄 PDF 💾 Save 📊 Excel

### Journal Details

Clerk	<input type="text"/>
Fiscal year	<input type="text"/>
Period	<input type="text"/>
Journal	<input type="text"/>
Journal reference 1	<input type="text"/>
Journal reference 2	<input type="text"/>
Short description	<input type="text"/>
Effective date	<input type="text"/>
Budget year code	<input type="text"/>
Entity code	<input type="text"/>
Amendment type	<input type="text"/>
Budget projection inclusion	<input type="text"/>
Amendment status	<input type="text"/>

Update recurring journal  
 Enter user defined info

### Workflow

My Approvals Approve Reject Forward Hold Approvers

3. Fiscal Year, Period and Journal will auto populate, **do not change these fields.**

In Journal Reference 1, enter 199 + your Budget Manager/Campus #. **(Example: 199001 or 461001).**  
Tab to Short Description, limited to 10 characters. Do your best to explain transfer. Tab & Accept.

**Budget Transfers and Amendments [BIRDVILLE ISD]**

Back Accept Cancel

Journal Details

Clerk

Fiscal year \* 2023

Period \* 02 AUG

Journal 1286

Journal reference 1 199410

Journal reference 2

Short description Clear Neg

Effective date \* 08/18/2022

Budget year code 1

Entity code \* 1

Amendment type \* 1

Budget projection inclusion Continuing

Amendment status

Update recurring journal

Enter user defined info

Workflow

My Approvals Approve Reject Forward Hold Approvers

4. From this screen choose add. Tab and enter your account number, tab and enter comment (purpose of transfer), tab through date, enter I for increase, D for decrease, tab and enter amount, tab and it will insert another line. Continue tabbing until you have entered all increases and decreases. Note Journal totals should be the same for Increase and Decrease when finished entering. Hit Accept and Return

**Budget Amendment Detail Lines**

Back Accept Cancel Search Add Delete User Defined View Budget

Journal

Journal 2023/02 1286 Ref 199410 Desc Clear Neg Eff Date 08/18/2022

Journal Lines

Line	T	Account Number	Comment	Eff Date	I/D	Amount
1	I	199-11-6399-MS-001-11-001-	FUND NEGATIVE BALANCE	08/18/2022	I	100.00
2	D	199-11-6399-PA-001-11-001-	FUND NEGATIVE BALANCE	08/18/2022	D	100.00

Add'l Description

Journal Totals

Increase 100.00

Decrease 100.00

Enter the journal entry amount

5. You will be taken back to original screen. Choose Release and your Budget transfer is now Pending Approval.

**Budget Transfers and Amendments [BIRDVILLE ISD]**

Back Browse Add Update Delete Print Display PDF Save Excel Email Schedule Attach Define Period **Release** Output-Post Lines

Journal Details

Clerk Soriano

Fiscal year 2023

Period 02 AUG

Journal 1293

Journal reference 1 199410

Journal reference 2

Short description clear neg

Effective date 08/18/2022

Budget year code 1

Entity code 1

Amendment type 1

Budget projection inclusion Continuing

Amendment status Held

Update recurring journal

Enter user defined info

Once released, this will change from Held to Pending Approval

Workflow

My Approvals Approve Reject Forward Hold Approvers