



LOYOLA UNIVERSITY MARYLAND

— 1852 —

Budget Transfer Request

When reallocating budget within departments or when sharing an expense between other departments that has not yet occurred.

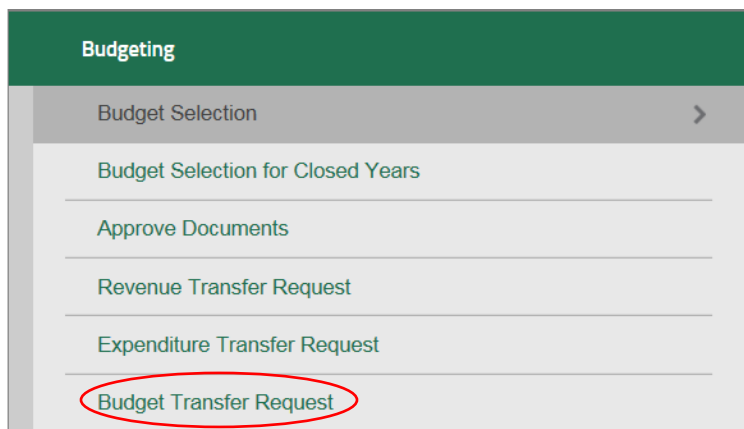
Step 1

Sign on to Inside Loyola (<https://inside.loyola.edu>) and locate the WebAdvisor menu.



Step 2

Select the Budgeting menu and select Budget Transfer Request.



Step 3

You will be directed to the Budget Transfer Request home page, see below. In the first section, select the budget line(s) from the drop down that you wish to move funds from. In the description line, identify the major/subclass, and then enter the amount to decrease the budget line.

In the second section, select the budget line(s) from the drop down that you wish to move funds into. In the description line, identify the major/subclass, and then enter the amount to increase the budget line.

Step 4

In the 'Comment to Budget Office', please describe the purpose of the transfer.

See an example of the completed form below.

Budget Transfer Request✕

A Budget Transfer removes the dollars from an account and places them in an alternate one.

TAKE AMOUNT FROM:

From Account	Description	From Amount
11_350000009_5552509	Budget & Planning: Equipment	25.00
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

MOVE AMOUNT TO:

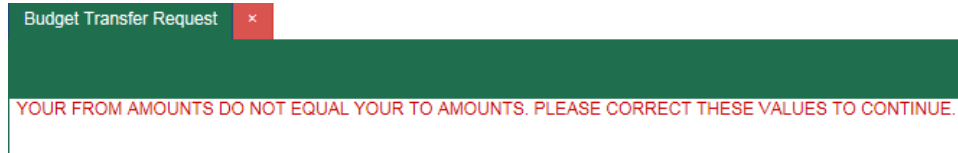
To Account	Description	To Amount
11_350000009_5250006	Budget & Planning: Comptuer Software	25.00
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Comment for Budget Office

Unexpected purchase needed for transcription software- using surplus funds from equipment.

Step 5

Select Submit. You will be redirected to a final review screen. Note, if your adjustment does not balance you will receive an error message, see below, and must balance your adjustment before being redirected to the final review screen.

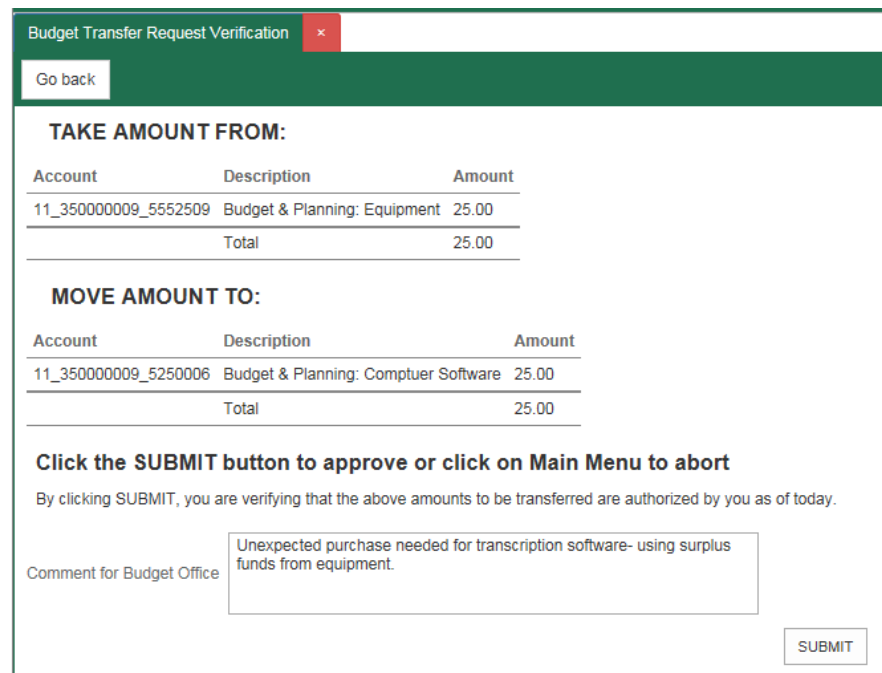


Budget Transfer Request

YOUR FROM AMOUNTS DO NOT EQUAL YOUR TO AMOUNTS. PLEASE CORRECT THESE VALUES TO CONTINUE.

Step 6

Make sure all budget lines were properly selected and the dollar amounts match desired transfer amounts. Once you are satisfied with the accuracy of the form, click Submit.



Budget Transfer Request Verification

Go back

TAKE AMOUNT FROM:

Account	Description	Amount
11_350000009_5552509	Budget & Planning: Equipment	25.00
	Total	25.00

MOVE AMOUNT TO:

Account	Description	Amount
11_350000009_5250006	Budget & Planning: Comptuer Software	25.00
	Total	25.00

Click the SUBMIT button to approve or click on Main Menu to abort

By clicking SUBMIT, you are verifying that the above amounts to be transferred are authorized by you as of today.

Comment for Budget Office

Unexpected purchase needed for transcription software- using surplus funds from equipment.

SUBMIT

You will be redirected back to Inside Loyola. Your transfer will be processed as soon as the budget and planning team reviews the request and submits it for final approval.

Please note:

- Make sure the budget line(s) being reduced have sufficient funds available to transfer.
- The online transfer form cannot be used for the following:
 - o Permanent adjustments
 - o Salary transfers
 - o Any accounts that you do not have MyBudget access(Complete the pdf form and email to the budget and planning office for all of the above exceptions).