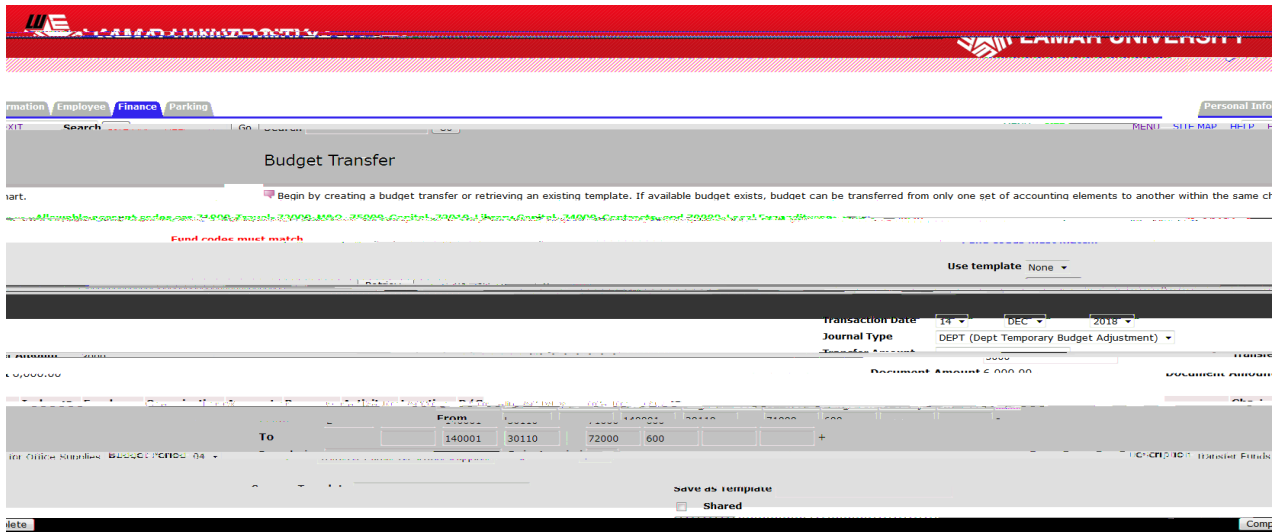- Log in to Self-

- Once ALL 5 fields are filled out, hit Complete.

- You will notice that once you hit complete from Step 2, it takes away your index and populated the Fund, Org, and Program. That is what we want to happen, DO NOT repopulate the index field. For this step all you need to do is add in the budget account pools that you want to transfer from, and transfer to.

- Once the 2 account fields are entered, hit Complete.

- After you hit complete, you will get a green check with a "J" document number that looks like this J19XXXXXX. (See Example Below)
- If you see the "J" document that means you have successfully entered the transfer to Budget for approval. Congratulations!
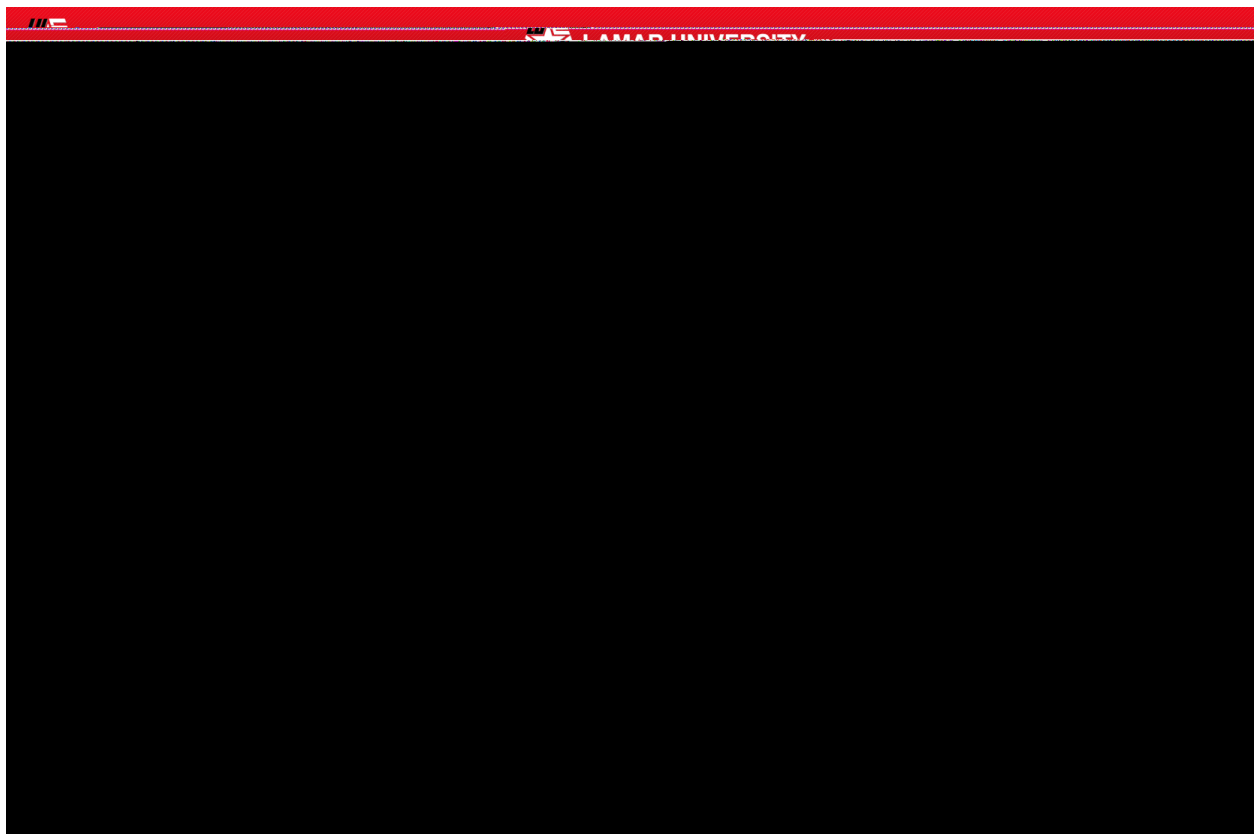
- If you continue to get an error message, go back to step 2 and review the fields that you have populated and confirm proper order of operations.
- ALL budget transfers are reviewed by the Budget Office. In the event a transfer is disapproved, the department will be contacted with information regarding its disapproval.
- If any questions regarding the Budget Transfer Process, please contact the Budget Office for additional support.