

How to enter a Budget Transfer in Skyward

Web Financial Management - WF - 10636 - 05.16.06.00.08 - Internet Explorer
https://business.stlucie.k12.fl.us/scripts/wvisa.dll/WService=wsFin/sfmhom01.w

Dana Schang Account Preferences Exit

St Lucie County Schools
SKYWARD

Home Account Management Vendors Purchasing Accounts Payable Fixed Assets SBAA Custom Reports Federal/State Reporting

Financial Management Setup

Account Management Setup

Account Master Setup

- Account Profile
- Chart of Accounts
- Account Summary Templates
- Operating Statement Accounts
- Balance Sheet Accounts

Account Management Reporting

- Budgetary Data Mining
- Vendor Check History
- General Inputs History
- Batch Reports

Budget Management Setup

- Budget Entry
- Adopt Budget
- Requisitions
 - Budget Request
 - Budget Approval
- Revisions
 - Budget Revisions
- Transfers Setup
 - Submit Transfers
 - Approvals
 - Activity
 - Transfers
 - Accounting Update - Budget Transfers
 - Update History - Budget Transfers

General Inputs

- Journal Entry Setup
 - Submit Journal Entry
 - Approvals
 - Journal Entry
- Cash Receipts
 - Cash Receipts
- Student Billing
 - Student Billing
- Previous Year Adjustments
 - Previous Year Adjustments

Project/Grant Management

- Reports

- From the Home Screen
- Click Account Management
- Under the Budget Management Heading
- Click Transfers
- Submit Transfers

Submit Transfers - WF\AM\BM\TR\ST\ST - 11562 - 05.16.06.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsisd.dll/WService=wsFin/fobrqrws006.w

St Lucie County Schools

Dana Schang Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Fixed Assets SBAA Custom Reports Federal/State Reporting

Submit Transfers

Views: General Filters: *History

Create Date	S*	T	Batch	Description	Debit Amount	Credit Amount	Net Amount	Entered By
02/12/2016	H	E	15-02613	Test Transfer	10.00	10.00	0.00	SCHANG DANA MARTIN
05/23/2014	H	E	13-03982	48114	535.32	535.32	0.00	SCHANG DANA MARTIN
05/23/2014	H	E	13-03976	46414	4,170.00	4,170.00	0.00	SCHANG DANA MARTIN
05/23/2014	H	E	13-03975	10100	627.98	627.98	0.00	SCHANG DANA MARTIN
05/20/2014	H	E	13-03927	46414	14,179.98	14,179.98	0.00	SCHANG DANA MARTIN
05/15/2014	H	E	13-03859	Sub for Siranni	535.32	535.32	0.00	SCHANG DANA MARTIN
05/15/2014	H	E	13-03857	46414	941.31	941.31	0.00	SCHANG DANA MARTIN
05/15/2014	H	E	13-03841	46414	189.00	189.00	0.00	SCHANG DANA MARTIN
05/14/2014	H	E	13-03830	46414	25,093.22	25,093.22	0.00	SCHANG DANA MARTIN
05/12/2014	H	E	13-03788	01500	263.00	263.00	0.00	SCHANG DANA MARTIN

Refresh Add Edit Delete Submit Notes Attach Data Retention on Add

➤ Click the Add Button on the right side of the screen



Budget Transfers - WF\AM\BM\TR\ST\ST - 11562 - 05.16.06.00.08 - Internet Explorer
https://business.stlucie.k12.fl.us/scripts/wvisa.dll/WService=wsFin/fobrqedit020.w?isPopup=true

Budget Transfers

* Fiscal Year: **2016 - 2017** * Batch Number: **16-00803**

* Transfer Type: **Expense**

* Description:

Amount:

Budget Transfer Detail Lines

Detail Budget Transfer		Transfer Amount	
General Ledger Account	Transfer From	Debit Amount	Credit Amount
<input type="text" value="Account:"/>	<input type="text" value="Transfer From"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
* Description: <input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Detail Budget Transfer		Transfer Amount	
General Ledger Account	Transfer From	Debit Amount	Credit Amount
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General Ledger Account	Transfer From	Debit Amount	Credit Amount
<input type="text" value="Account:"/>	<input type="text" value="Transfer From"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
* Description: <input type="text"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Asterisk (*) denotes a required field

- **Check your Fiscal Year**
- **Add Description of why you are moving the money**
- **Enter the account code of the first account you need to transfer**
- **Enter the description again (You can use Copy and paste in these areas)**
- **Click the drop down box to choose “Transfer From or Transfer To”**
- **Enter the Amount of transfer**
- **Once you Click Submit, your transfer is auto approved and budget is available.**

Example of what a Budget Transfer should look like before submitting

Budget Transfers - WF\AM\BM\TR\ST\ST - 11562 - 05.16.06.00.08 - Internet Explorer
https://business.stlucie.k12.fl.us/scripts/wsisa.dll/WService=wsFin/fobrqedit020.w?isPopup=true

Budget Transfers

* Fiscal Year: 2016 - 2017
* Transfer Type: Expense [Rules](#) * Batch Number: 16-00803

* Description: Transfer for Training
Amount: 0.00

[Submit for approval](#)
[Save and finish later](#)
[Back](#)

Budget Transfer Detail Lines

Detail Budget Transfer		Transfer Amount	
General Ledger Account		Debit Amount	Credit Amount
Account: 1200E6403 1290 0020 10100 00000 00000 - FAU LAB SCHOOL/TRAIN-METHODS/T	Transfer To		1,000.00
* Description: Transfer for Training		1,000.00	0.00
<hr/>			
Account: 1200E5100 5100 0020 10100 00000 00000 - FAU LAB SCHOOL/BASIC EDUCATION	Transfer From		1,000.00
* Description: Transfer for Training		0.00	1,000.00
<hr/>			
Account:	Transfer From		0.00
* Description:		0.00	0.00
<hr/>			
Account:	Transfer From		0.00
* Description:			

Asterisk (*) denotes a required field

100%

Tips and Tricks:

- **Make sure money is available before moving funds**
- **Always use descriptions that you can utilize in the future for tracking.**
- **You cannot move between Funds (Example Fund 1000 and Fund 4200)**
- **You cannot move between Projects (Example Project 10100 and P5800)**
- **IF you get an error then you have tried to do one of the above.**