Approving Budget Transfers and Amendments – Principals (ONLY)

Objective

This document provides instructions on approving budget transfers and amendments.

Overview

When a budget transfer or amendment is released from the Budget Transfers and Amendments program, the program initiates an approval process that is driven by the contents of the transaction. When approvals are pending, required approvers will receive a notification through an e-mail in Outlook indicating that there are records awaiting approval. An approver should review the transaction for validity and ensure that all supporting documentation has been attached. The approver can then choose to approve, reject, hold, or forward a transaction to another user for additional review.

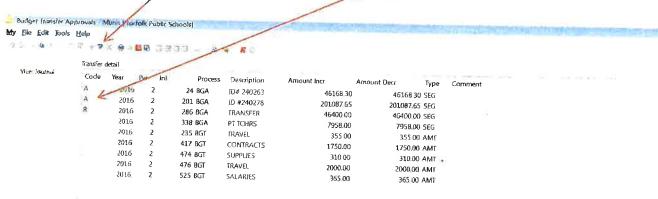
Procedure

To approve budget transfers and amendments in MUNIS:

- 1. TURN ON ALL CAPS ON YOUR KEYBOARD.
- 2. From the MUNIS menu, double-click: Departmental Functions > Budget Transfer Approvals

(ii)

3. Click the Update icon to open the action Code fields.



Action Codes	Description
A = Approve	Approves the transaction. Approved records continue to the next approver in sequence.
R = Reject	Rejects the transaction; This option requires that you enter a note to be sent to the <u>originator</u> . The note must indicate the reason for rejection and can assist the originator in determining the next course of action; an alteration and resubmission, or a deletion from the system.
F = Forward	Forwards the current transaction record to another MUNIS approver for review and requires entry of that approver's email address.

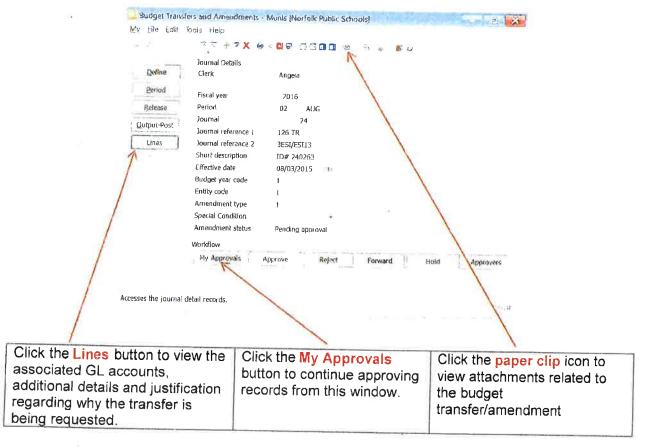
4. Click the View Journal button to view additional details and attachments.

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NOTE: Clicking the View Journal button will take you to the following screen where you can double-click each record to view additional details and attachments.



Double-clicking each record (above) will take you to the screen below where you can perform several actions.



GL Impact

Once all identified approvers have approved budget transfers and/or amendments, they are posted by the Budget Department and the adjustments appear in the associated GL accounts.