

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



Budget Transfer Approvals - MUNIS (Norfolk Public Schools)

File Edit Tools Help

Transfer detail

Code	Year	Pat	Int	Process	Description	Amount Incr	Amount Decr	Type	Comment
A	2016	2		24 BGA	ID# 240263	46168.30		46168.30 SEG	
A	2016	2		201 BGA	ID #240278	201087.65		201087.65 SEG	
R	2016	2		286 BGA	TRANSFER	46400.00		46400.00 SEG	
	2016	2		338 BGA	PT TCHRS	7958.00		7958.00 SEG	
	2016	2		235 BGT	TRAVEL	355.00		355.00 AMT	
	2016	2		417 BGT	CONTRACTS	1750.00		1750.00 AMT	
	2016	2		474 BGT	SUPPLIES	310.00		310.00 AMT	
	2016	2		476 BGT	TRAVEL	2000.00		2000.00 AMT	
	2016	2		525 BGT	SALARIES	365.00		365.00 AMT	

Action Codes	Description
<b>A = Approve</b>	Approves the transaction. Approved records continue to the next approver in sequence.
<b>R = Reject</b>	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.
<b>F = Forward</b>	Forwards the current transaction record to another MUNIS approver for review and requires entry of that approver's email address.

4. Click the  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.

Budget Transfers and Amendments											
Rec	Year	Per	Journal	Date	Ref1	Ref2	Description	Total Increase	Total Decrease	Clerk	Workflow Status
9	2016	02	932	08/12/2015	150 TR	3ESI/ESI14	PT TCHRS	7,552.00	7,552.00	afitzgerald	Pending Approval
8	2016	02	286	08/11/2015	701TRA	DFAIRHEART	TRANSFER	46,400.00	46,400.00	lhunter	Pending Approval
7	2016	02	201	08/10/2015	150 TR	3ESI/ESI14	ID #240278	201,087.65	201,087.65	afitzgerald	Pending Approval
6	2016	02	24	08/03/2015	126 TR	3ESI/ESI13	ID# 240263	46,168.30	46,168.30	afitzgerald	Pending Approval
5	2016	02	525	08/18/2015	9721RA	MTHORNTON	SALARIES	365.00	365.00	svellis	Pending Approval
4	2016	02	476	08/17/2015	304TRA	ADAY	TRAVEL	2,000.00	2,000.00	svellis	Pending Approval
3	2016	02	474	08/17/2015	214TRA	SCOOME	SUPPLIES	310.00	310.00	svellis	Pending Approval
2	2016	02	417	08/13/2015	128TRA	PTATEM	CONTRACTS	1,750.00	1,750.00	svellis	Pending Approval
1	2016	02	235	08/10/2015	923TRA	DROBY	TRAVEL	355.00	355.00	khume	Pending Approval

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

Budget Transfers and Amendments - Munis (Norfolk Public Schools)

My file Edit Tools Help

Journal Details

Clerk: Angela

Fiscal year: 2016

Period: 02 AUG

Journal: 74

Journal reference 1: 126 TR

Journal reference 2: 3ESI/ESI13

Short description: ID# 240263

Effective date: 08/03/2015

Budget year code: 1

Entity code: 1

Amendment type: 1

Special Condition:

Amendment status: Pending approval

Workflow

My Approvals: Approve Reject Forward Hold Approvers

Accesses the journal detail records.

Click the **Lines** button to view the associated GL accounts, additional details and justification regarding why the transfer is being requested.

Click the **My Approvals** button to continue approving records from this window.

Click the **paper clip** icon to view attachments related to the budget transfer/amendment

### 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.