



## BUDGET TRANSFER REQUEST

### OVERVIEW

- ▶ The budget transfer request procedure for unrestricted funds (fund 10) accounts is used to initiate a transfer of budgeted funds from one account to another. This procedure is not currently available on the Datatel Colleague application. Requests are to be routed via e-mail and submitted to the Budget Office for entry into the Colleague system.
- ▶ The contact for Budget Transfer Requests in the unrestricted fund is Teresa Lindgren (783-2021).

### BUDGET TRANSFER REQUEST

#### OBTAIN BUDGET TRANSFER REQUEST (BTR) FORM

- ▶ From the **Office of Budgets** website under heading **BUDGET TRANSFER REQUESTS** click on **BUDGET TRANSFER REQUEST FORM**.

#### COMPLETE BTR FORM

- ▶ Enter Your Name as the **ORGINATOR**
- ▶ Enter Current Date in **DATE** field
- ▶ Enter 17 digit **ACCOUNT NUMBERS** including hyphens (ex. 10-10302000-5100100)
- ▶ Enter **UNIT DESCRIPTIONS** associated with account numbers (ex. Curriculum & Instruction)
- ▶ Enter **OBJECT DESCRIPTIONS** associated with account numbers (ex. Supplies)
- ▶ Enter amount of budget **INCREASE** in **DEBIT** column
- ▶ Enter amount of budget **DECREASE** in **CREDIT** column
- ▶ Total debits and credits **MUST** equal.

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**SUBMIT BTR FORM**

- ▶ Entry in all fields is **REQUIRED**
- ▶ For **FINAL APPROVER** lookup, go to **Office of Budgets** website under heading Budget Transfer Requests, click **LIST OF FINAL APPROVERS**
- ▶ Save BTR form
- ▶ Send completed BTR form as attachment **VIA E-MAIL** to designated e-mail account of **FINAL APPROVER**
- ▶ **FINAL APPROVER** will forward the e-mail with attached BTR form to [Budgets@moreheadstate.edu](mailto:Budgets@moreheadstate.edu) for entry into Colleague system



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