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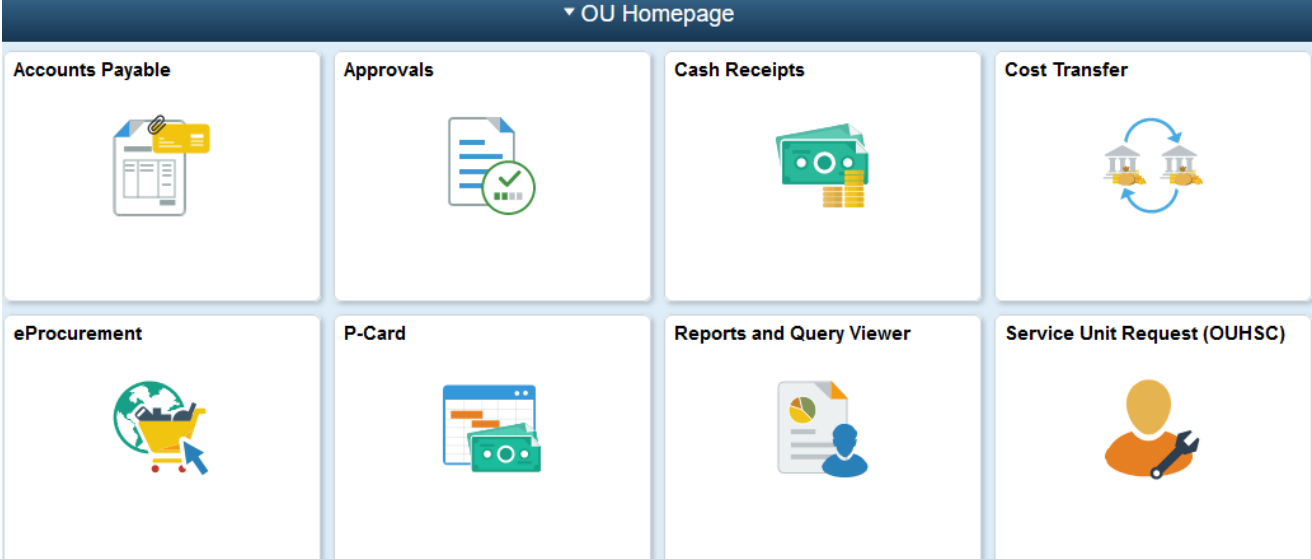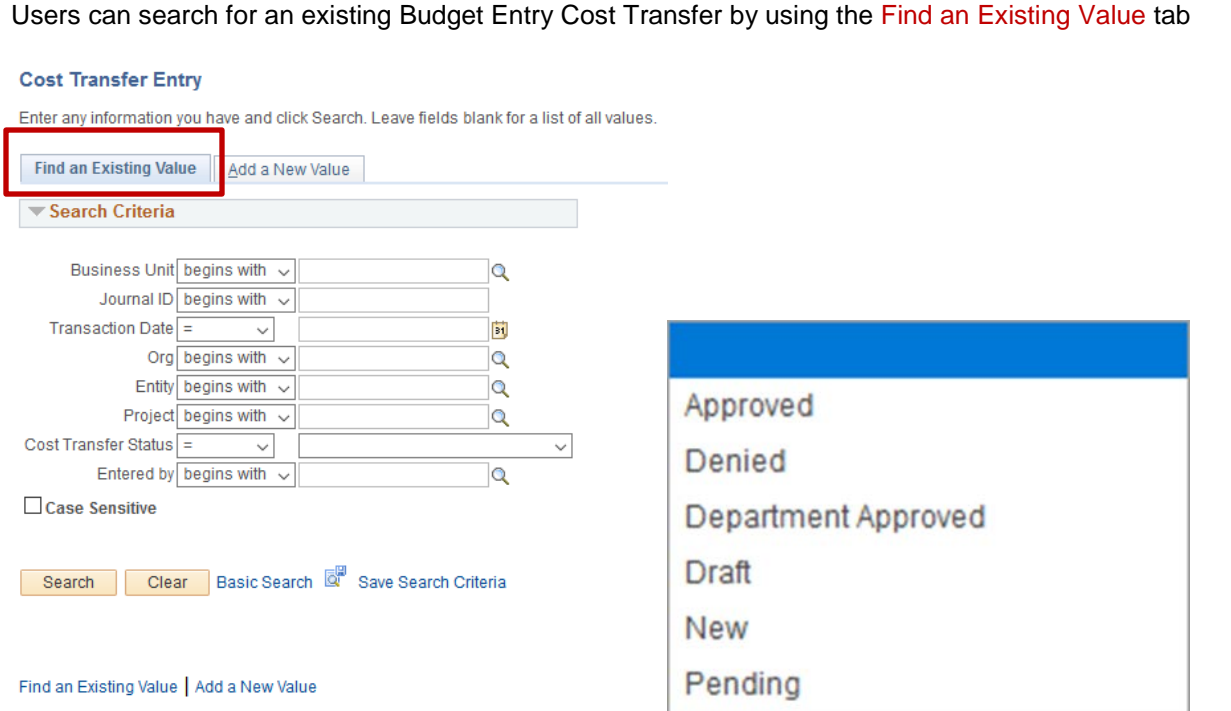| Step	Action
1	After logging into PeopleSoft Financials, you will access Cost Transfer via the Homescreen under Cost Transfer and then click on Cost Transfer Entry. You can also get to the screen via Nav Bar > Navigator > OU Main Menu > Cost Transfer > Cost Transfer Entry
2	Users can search for an existing Budget Entry Cost Transfer by using the Find an Existing Value tab

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| 3 | Users can add a new Budget Entry Cost Transfer by using the Add a New Value tab. The Business Unit will default to the user's default Business Unit. Click Add. Add will take you to the Cost Transfer Entry screen where the user can begin their selections. |

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Cost Transfer Entry

Find an Existing Value | **Add a New Value**

Business Unit OUHSC

Add

Cost Transfer | Attachments

Business Unit OUHSC   Journal ID NEXT   Transaction Date 06/18/2020

Distribution Status None   Status New

☐ Cost Transfer   ☐ Payroll Transfer   *Org [   ]   ☐ Budget   ☐ OU Foundation

	The Business Unit will be updated by the previous Add screen. The Journal ID will remain at NEXT until you have a valid Save. The Transaction Date will default to current date. The Distribution Status will remain at NONE until the cost transfer has been distributed to a journal entry. The Status will remain at NEW until the budget entry has been submitted for workflow. The ORG field tells the system which organizational approver that this budget entry will route to.
4	For a Budget Entry Cost Transfer, the user will select the Budget Entry checkbox. The Budget Change tab will appear.

Cost Transfer | **Budget Change** | Attachments

Business Unit OUHSC   Journal ID NEXT   Transaction Date 06/27/2020

Distribution Status None   Status New   ☐ Draft

☐ Cost Transfer   ☐ Payroll Transfer   *Org [   ]   ☑ Budget   ☐ OU Foundation

*Justification [   ]

The Draft box is used to allow users to save the Budget Entry Cost Transfer in draft mode. The draft mode bypasses any edit checking.

Personalize | Find | View All | 🗗 | 📷   First 1 of 1 Last

Account	Fund	Org	Function	Entity	Source	Purpose	Project	Amount	Ref	Descr	Position
1											➕ ➖

5	For budget entry, the user must use the following fields: Account, Fund, Org, Function, Entity, and Amount. If the budget is for SUAUX, EDWCH, or SVCCT funds then the Source field is required.

Reference and **Description** fields are for departmental use.

A totaled cash query for each chartfield spread on the budget revision must be attached or the budget revision will be denied.

The enterer will submit the budget entry for approval, which then routes to the org approver. Once approved by the org approver, the budget entry will route to the Budget Office or the appropriate authority in Financial Services.

Approvals

Comments [   ]

[Submit for Approval]

[💾 Save] [📧 Notify]   [📑 Add] [📝 Update/Display]

To add more lines, the user will click the + sign. The system will ask you how many rows to add and will copy down the previous row lines saving the user some key strokes.

Enter number of rows to add:

[1]

[OK] [Cancel]

To add an attachment, click on the Attachments tab.

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	Cost Transfer	Budget Change	**Attachments**

Business Unit OUHSC   Journal ID NEXT   Transaction Date 06/27/2020

Personalize | Find | | 🖳   First ◀ **1 of 1** ▶ Last

Attached File	View	Delete		
1 BUDGET_EXAMPLE.xlsx	View	Delete	➕	➖

🖫 Save   ✉ Notify   ➕ Add   ✎ Update/Display