After logging into PeopleSoft Financials, you will access Cost Transfer Approval via the Homescreen under Approvals and then click on Cost Transfer Entry or Worklist. You can also get to the screen via Nav Bar > Navigator > OU Main Menu > Cost Transfer > Cost Transfer Entry or Nav Bar > Navigator > Worklist > Worklist.

Users can search for a Pending Cost Transfer on the Cost Transfer Entry screen under Find an Existing Value tab or via their Worklist. Users can use any of the search criteria to search for the Cost Transfer or just click Search and it will show you all Pending Cost Transfers for your organizations.
Approvers will want to make sure that Justification is correct. If not correct or if not enough information is supplied, the cost transfer may be denied.

Approvers will want to make sure that the Chartfield Information is correct. Be sure to double check the debits and credits of the cost transfer. If it is not correct, the approver can Deny the Cost Transfer and send it back to the enterer for re-entry. Approvers cannot change any Chartfield Information as it will be greyed out for them.

Approvers will want to review any attachments and make sure that the required attachments are available for review by the final approvers.

Approvers can Deny by clicking the Deny button and putting in deny comments. An email will be sent to the entry person. The entry person may update and resubmit for approval.

Approvers can Approve by clicking the Approve button. An email is then sent to the Financial Services department letting them know there is a Cost Transfer waiting for them to approve.
The UNIVERSITY of OKLAHOMA

Cost Transfer Entry - Approver

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[Comments field]

[Approve] [Deny]