Budget Transfer Smartdoc Enhancement

1. Select Add a New Value and click Add

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- 2. Entry
 - a. Select Budget Entry Type (Transfer Adjustment or Transfer Original)
 - b. Enter Comment. Please be as detailed as possible in describing the reason for the transfer
 - c. Enter lines
 - i. You now have the ability to enter budget transfers for Account Group 2 (student, temp, other comp, etc...), Account Group 4 (operating expenses), and Account Group 5 (centrally managed expenses)
 - ii. Prior to this enhancement only Account Group 4 was available on this smartdoc
 - d. There is now a comment field available at the line level in case you want to include a short (30 character max) note at that level of detail

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3. Fringe

- a. Temp Help (81715) and Miscellaneous Comp (81725) have fringe benefits associated with them that will need to be factored into your transfer
- b. In both cases the fringe rate is 7.65%
- c. When you enter an account with fringe associated with it you will see this warning reminding you to hit the "Calculate Fringe Accounts" button after entering the Comp amount
- d. Fringe calculation help:
 - i. if you know the amount that you need to transfer to comp enter that amount in the highlighted cell of the second column and the total amount will show what you need to have available to transfer.
 - ii. If you know the amount that you have to transfer and need to know how much to enter as comp enter the amount in the highlighted cell of the third column and the comp amount will be what you should enter on the transfer

	Know Comp Amount	Know Transfer Amount	
Comp	250.00	232.23	
Benefits	19.13	17.77	
Total	269.13	250.00	

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e. After hitting "Calculate Fringe Accounts" you will see that a fringe row has been added and both the Comp row and its associated benefits are now no longer editable. If you need to change the amount you will need to delete both rows and re-enter

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4. Once you have completed entering the transfer and it is balanced hit Save and Submit

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5. After hitting Save and Submit you will receive confirmation that it was successfully submitted and assigned a Budget Transfer ID

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Click OK to return to the transaction.						
OK						

6. After the transfer has been submitted it will no longer be editable and if a change needs to be made you will need to request that the next person in workflow Deny the document

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