



ANTELOPE VALLEY COLLEGE

APPROVING ONLINE BUDGET TRANSFER INSTRUCTION

Updated October 2025

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SSB BUDGET TRANSFER APPROVAL

Introduction

Before completing a requisition, the requestor should ensure sufficient budget is in place. Completing a requisition with a deficient budget will only delay processing. If budget is insufficient the requestor should review their total organizational budget to find sufficient funding. Departments may use Self Service Banner (“SSB”) to transfer the placement of their existing budget within an organization code. Upon selecting the complete button, the budget transfer request is sent to an approval queue consisting of at least the dean and/or director and a fiscal services representative. It is recommended to stay within major account codes (example 5300 to 5100).

Please note the necessity of a funds transfer is based on the value for the total budget pool. Refer to the SSB Budget Query Training Manual for SSB access, chart of accounts, pooled budgeting and budget query instructions.

Online Budget Transfer

Permissions

- ☐ Within the fund and organization code that fall under your responsibility
- ☐ Within and between the major four-digit account codes beginning with 4, 5 & 6, excluding 4320 & 5200
It is recommended to stay within major account codes (example 5300 to 5100)
- ☐ Within and between program codes of a particular organization

Transfers Requiring the Use of the Paper Budget Transfer Form

- ☐ Between organization codes
- ☐ In or out of 5200 Travel
- ☐ **In or out of 4320 Lab Fees (Student Material Fees) FINANCIAL & FISCAL SERVICES ONLY**
- ☐ In or out of 7xxx
- ☐ In or out of 1xxx, 2xxx & 3xxx wages & benefits

Paper Budget Transfer Form

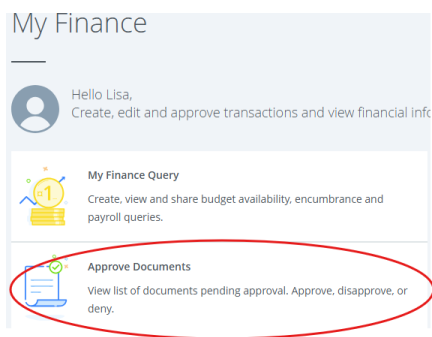
1. Download the current budget transfer form from the district website <https://www.avc.edu/financial-fiscal-services/budgets>
2. Use for budget transfers that do not fall within the allowable online SSB transfers (see above)
3. Complete all fields and obtain required signatures via Adobe Sign. Your fiscal representative will sign in the area assigned to Business Services Approval.
4. Indicate whether the budget transfer is permanent or temporary in the appropriate field
Permanent: remains in destination FOAP next fiscal year
Temporary: returns to original FOAP next fiscal year
5. WAIT to complete your requisition until you receive an email from Financial & Fiscal Services notifying you the budget transfer is complete.

Budget Transfer

- 1. **DBP (Permanent Department Budget Transfer) NOT USED AS ALLOCATION OF PERMANENT BUDGET IS DISCUSSED AT ANNUAL BUDGET DEVELOPMENT MEETINGS.**
Funds will remain in destination FOAP next fiscal year
- 2. **DBT (Temporary Department Budget Transfer) PREFERRED AND MOST FREQUENTLY USED**
Funds will return to the original FOAP next fiscal year

Approving Online Budget

Step 1: From your My Finance Dashboard, select Approve Documents.



Step 2: Your User ID will auto populate. You can enter the journal number in the Document Number field or click the radio button “All documents User may approve” to see all documents in your queue. Click Submit.

Approve Documents

The radio buttons related to next approver apply when a User ID is present.

User ID

Document Number

LNOWAK

Submit

☐ User ID is next approver

☒ All documents User may approve

Step 3: Locate the document you want to approve

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	History	Disapprove	Approve
J0024103	JV	-	0	MDARBY1	300,000.00	Yes	-	DOC	🕒	Disapprove	Approve
J0024108	JV	-	0	MLATHROP2	1,400.00	Yes	-	DOC	🕒	Disapprove	Approve
J0024110	JV	-	0	DCONNER5	200.00	Yes	-	DOC	🕒	Disapprove	Approve

Step 4: Select the journal for review to ensure all fields are completed and accurate.

JOURNAL VOUCHER

Journal Voucher Number	J0024110	Document Total	200.00	Status	Pending
Submission	0	User ID	DCONNER5		
Transaction Date	10/01/2025	Activity Date	10/01/2025		
Public Comments					

Accounting Distributions

SEQ	Description	FY-Period	Budget Period	Rule Class	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	Amount	Debit/Credit	Currency	Bank Code	NSF Override	Status	Document Reference Number	Accrual Indicator	Deposit
1	My desc for a test - DC	26-04	04	DBT	A--00000-11150-5100-678000---	100.00	-	USD		No	P		No	
2	My desc for a test - DC	26-04	04	DBT	A--00000-11150-4500-678000---	100.00	+	USD		No	P		No	
Total Accounting Distributions						200.00								

DISCLAIMER - This Journal Voucher PDF is restricted to internal use only.

Step 5: Return to the Approve Documents screen and then click the Approve button

My Finance • Approve Documents

or attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	History	Disapprove	Approve
J0024110	JV	-	0	DCONNER5	200.00	Yes	-	DOC	🕒	Disapprove	Approve

Approve Document

Document Number
J0024110

Document Type
JV

Change Sequence
-

Submission
0

Amount
200.00

Comment
This document has been approved.

Cancel Approve

Approval History Screen View – Once your approval is recorded, the document moves to the next approver.

Approval & Related Documents - Journal Voucher

Related Documents

No Related Documents information available for J0024110

Approval History

1003 Executive Director of ITS (003G) (10)

Daniel Conner | 10/01/2025

1003 EXECUTIVE DIRECTOR OF ITS (B003) (10)

Lisa Nowak | 10/07/2025

Approvals Required

VICE PRESIDENT ADMINISTRATIVE SERVI (CVPA) (10)

Shaminder Brar

[BACK TO VIEW DOCUMENT](#)

Required

Fiscal Services Representative and Director/Dean/Fund Manager are included in all transfer approvals; additional approvals are required as follows based on the document amount of the journal. The document amount is the sum of the values on all FOAP lines.

- \$1,000 require VP/Executive Director approval
- \$5,000 requires CBO approval
- \$25,000 requires president’s approval

Reviewing Transfer Status

Transfers will post once all approvals are recorded. Use the View Document menu option; Approval History to see the current status.

Approval History

President \$25K (PRES) (10)

Jennifer Zellet | 08/15/2025

HVAC Heating Units Upgrade Replacem (162G) (10)

Shaminder Brar | 08/15/2025

VICE PRESIDENT ADMINISTRATIVE SERVI (CVPA) (10)

Shaminder Brar | 08/15/2025

Exec Director of Business Serv \$5K (EXBS) (10)

Tammara Steffes | 08/13/2025

HVAC Heating Units Upgrade Replacem (B162) (10)

Tammara Steffes | 08/13/2025

Approvals Required

No Approval required information available for J0024110