CNM Finance Self-Service
Budget Transfer Approvals

Logging into CNM Finance Self-Service:

- Go to the CNM homepage (www.cnm.edu)
- Click on the MyCNM button
- Log in using your CNM network username and password
- Select Finance tab at the top of the screen
- Click on the Finance Self-Service link

The Finance Menu contains the following options:

The Approve Documents option allows the Control Agent or Grant Accountant and Budget Office to Approve or Disapprove a Budget Transfer or a Multiple Line Budget Transfer.
**Steps to Approve or Disapprove Budget Transfers**

1. Choose the Approve Documents link on the Finance menu

2. The User ID field will default with your user ID

3. The Document Number field is used if you know the document number in which you are going to approve

4. The “Documents for which you are the next approver” option also defaults to retrieve documents in which you are next to approve or disapprove. Note: This is preferred to avoid processing confusion.

5. The “All documents which you may approve” option allows you to view/ approve or disapprove that will eventually come to you. Click Submit Query

6. The Approve Documents* screen Contains:
   - The Document link allows you to review the details of the budget transfer
   - The History link allows you to view the document approval history
   - The Approve link to approve a specific document or click on the Disapprove link to disapprove a specific document

8. Click on the Continue Button. This will redirect you back to the Approve Documents page

*To drill down for further information, click on any items in blue text

*Use the browser arrows to navigate between pages
Helpful Tips for Budget Transfers and Approvals

- **Journal Types**
  - BDX2—Permanent Budget Adjustment (adjusts current fiscal year and subsequent fiscal year base budget)
  - BDX3—Contract/Grant Budget (use for original contract and grant budgets, as well as adjustments)
  - BDX4—Temporary Budget Adjustment (adjusts only current year fiscal year)

- Budget transfers need to be done within the same fund (i.e., 1001).
- Users can only transfer budget within cost accounts for which they have access.
- Before moving funds, make sure there is sufficient budget in accounts that are being decreased.
- Transfer amounts need to be full dollar (no cents) be sure to round up to cover expenditure (non-grant).
- For grants, transfer amounts need to be exact in dollar and cents.
- The pluses (transfers to) must equal the minuses (transfer from).
- In Multiple Line Transfers, the amounts must offset one another and add up to the Document Amount.
- The Description field has a maximum of 35 characters.
- If you do not complete the transaction and the system times out or you go to another screen, your work will not be saved and you will have to start over.
- Once transfer is complete, it is forwarded through the online approval process.
- Once approved by the Budget Office, the transfer will be posted and be reflected in the Banner system.
- No Proxies in Finance Self Service - control agents and approvers cannot assign or authorize proxies to approve online transactions on their behalf.
- Please notify Budget Office of any control agent and/or Approver changes.
- Remember to keep a copy of any documentation that will help you to explain or remember why your transfer was necessary.

**Note:** Purchase requisitions will be returned to department by Business Office if budget balance in the requested line item(s) is insufficient or unavailable. Process a budget transfer prior to resubmitting purchase requisition.

For support, please contact the Budget Office at:

Phone: 505.224.3450
Unrestricted Budget Transfer Approval Process

1. Initiator
2. Control Agent
3. Budget Office
Grant/Contract Budget Transfer Approval Process

Department submits budget transfer request to grant accountant via email/excel/file.
With funding agency budget transfer approval.

Grant Accountant

Control Agent/ PI

Budget Office