

**Budget Transfer Journal Workflow Is Live**  
**Aug. 3, 2020**

The new budget transfer journal process is now live and available for department use. UTSA has implemented automated workflow for budget transfer journals. This allows the document created in PeopleSoft to route through a designated workflow approval process and post to the appropriate budget ledger. The new automated process replaces previous manual processes for creating and routing budget transfer journals and documentation.

Benefits of the automated process include:

- Accurate generation of budget transfer journals with ability to track electronic approvals.
- Budget validation for cost center/project ID entries.
- Email notification to approvers when a budget transfer journal routes through the workflow process.
- Automated review and confirmation of allowable budget transfers with regard to funds, cost centers and projects.
- Improved efficiencies, resulting in a stronger review process and timely posting.

**Training materials** are available on the [Budget Training Materials](#) and [Office of Research Finance Operations](#) websites. Materials include the PowerPoint used in budget transfer training sessions and a step-by-step user guide.