Using Lynx Finance
Self Service
At WSU
Budget Transfer

Log into the Faculty/Staff Portal
To get to Budget Transfer, go to **Self-Service**, and click on **Finance**, and then click on **Budget Transfer**.

Fill out the following fields:

- **Transaction date**: choose the day/month/year from the drop-down list.
- **Journal Type**: choose from **Between Current and Travel** or **Between Current and Capital**.
- **Transfer Amount**: type in the amount you wish to transfer.
- **Chart**: Capital W
- **Index** (cost code) on accounts you want to transfer money from and to. **From** is the account you wish to transfer money out of and **To** is the account you are moving the money into.
- **Description**: type in the description of the item you are transferring.
- **Budget Period**: Must be the current month (remember July is month 1).
- **Template**: You may save as a template and give the item a name.

After the cost code is entered in the **index** field, click **complete**. The form will fill in the **Fund**, **Organization**, and **Program** fields for you. Next, enter the appropriate code in the **Account** field for the accounts you are transferring money within.

- Expense account code is 71000
- Travel account code is 75000
- Capital account code is 77000

When the **Account** fields are filled out, click on **Complete**.
You will get a message saying that your document was forwarded to the posting process. Updates occur every day at 1:00 pm. Your transfer will show up on your account at the next update.