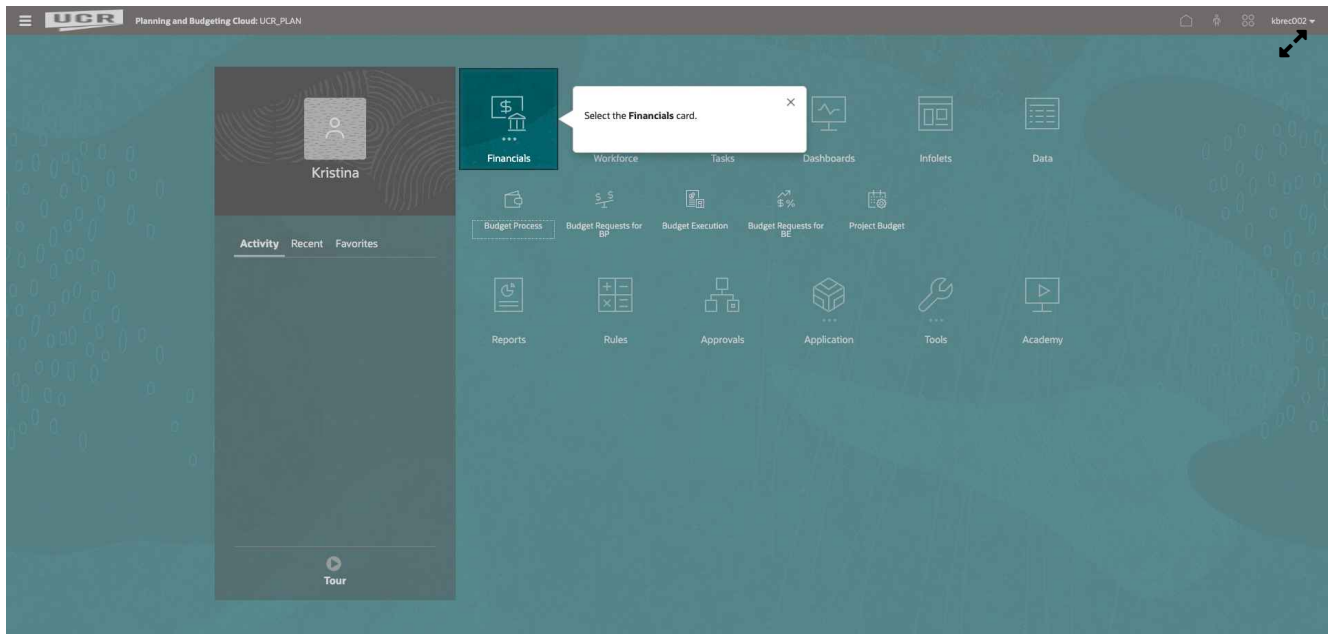# CFAOs: Approving Fund Swaps
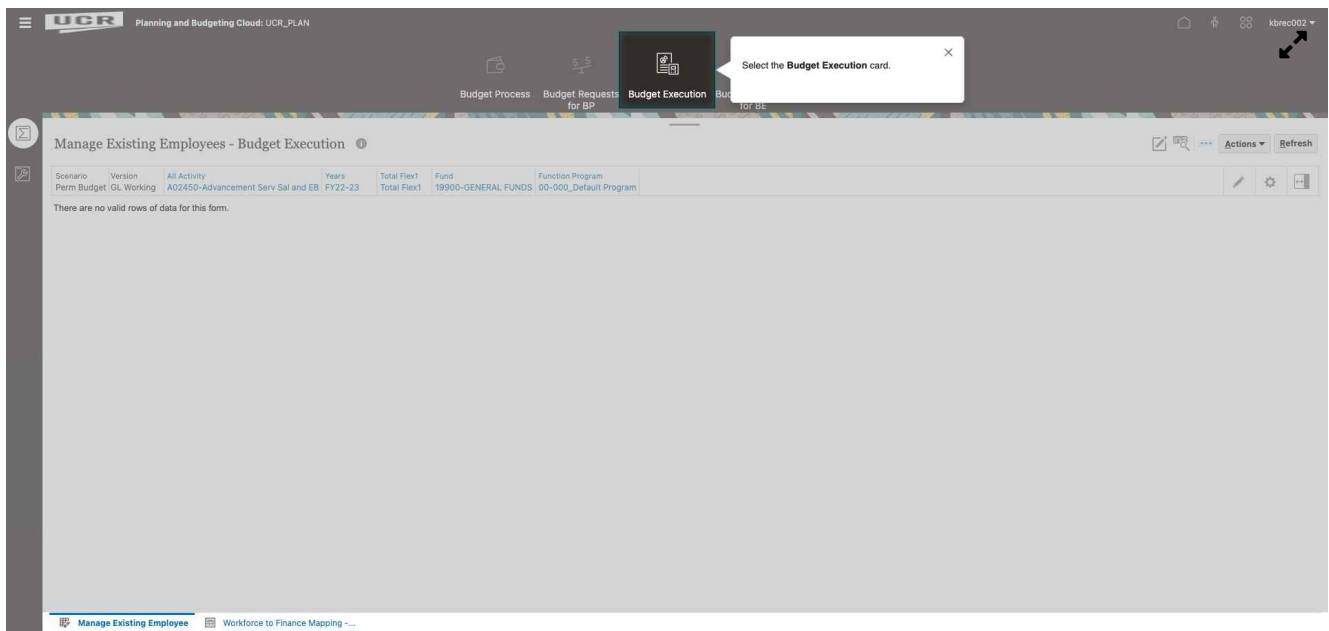
Last Updated: 09/01/2023 11:05 PM

STEP 1

Select the Financials card.
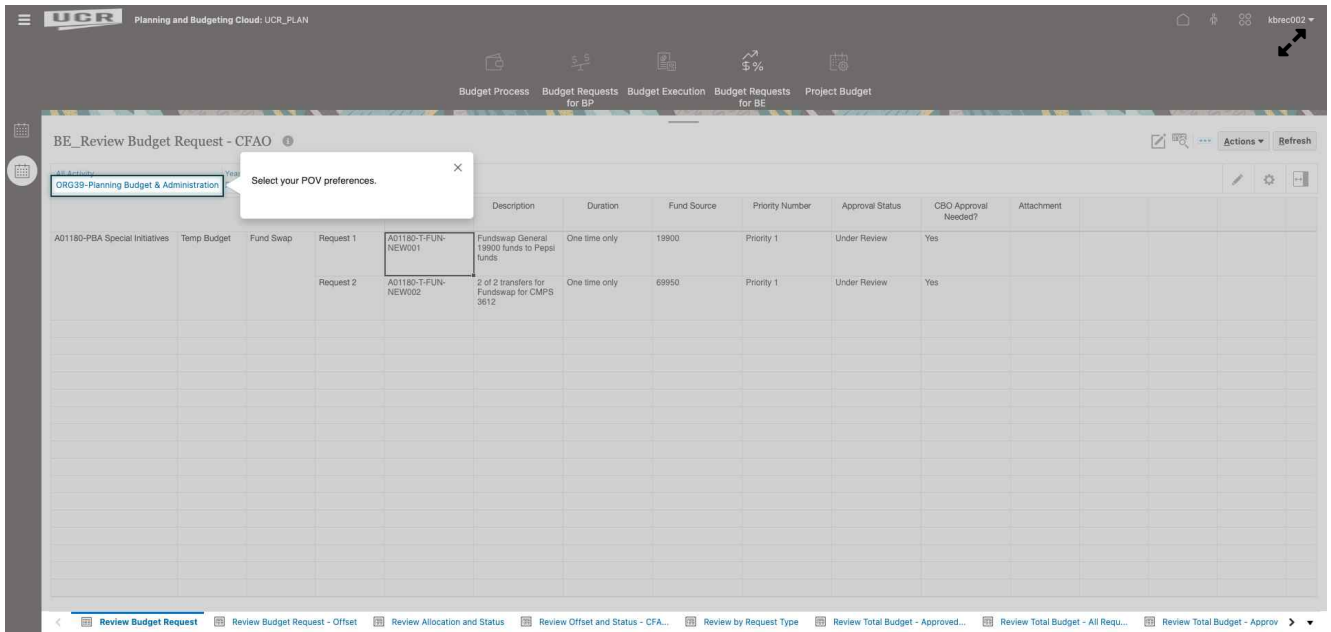
STEP 2

Select the Budget Requests for card.
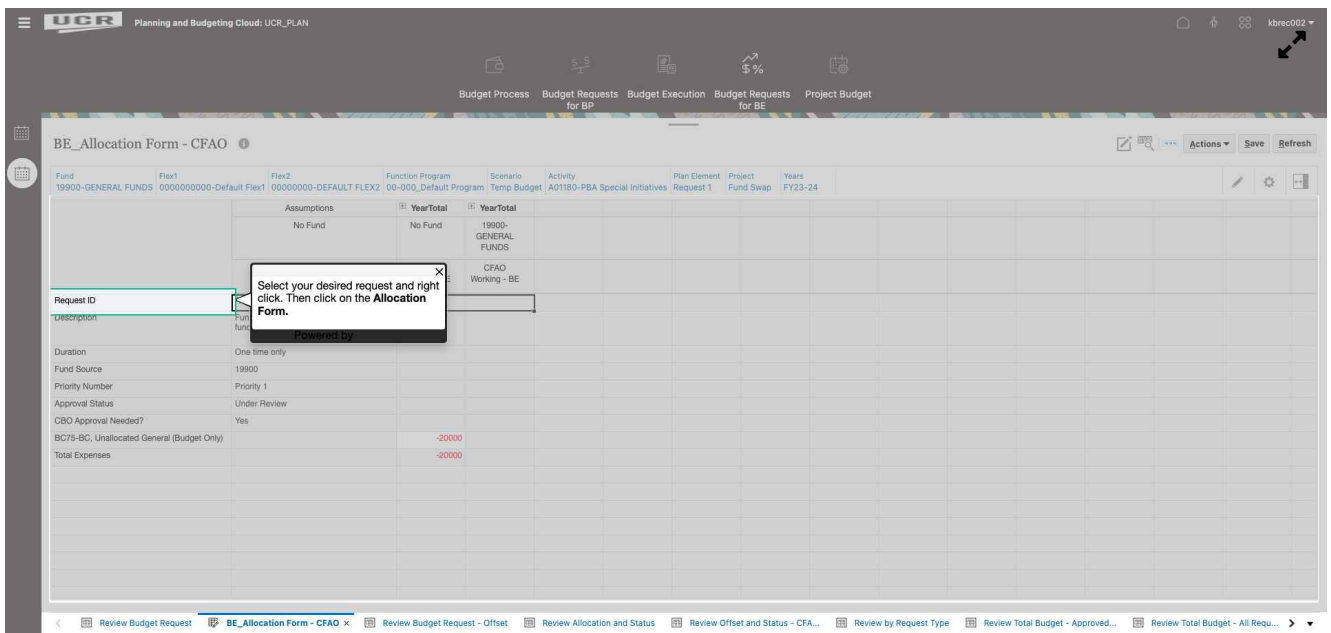
STEP 3
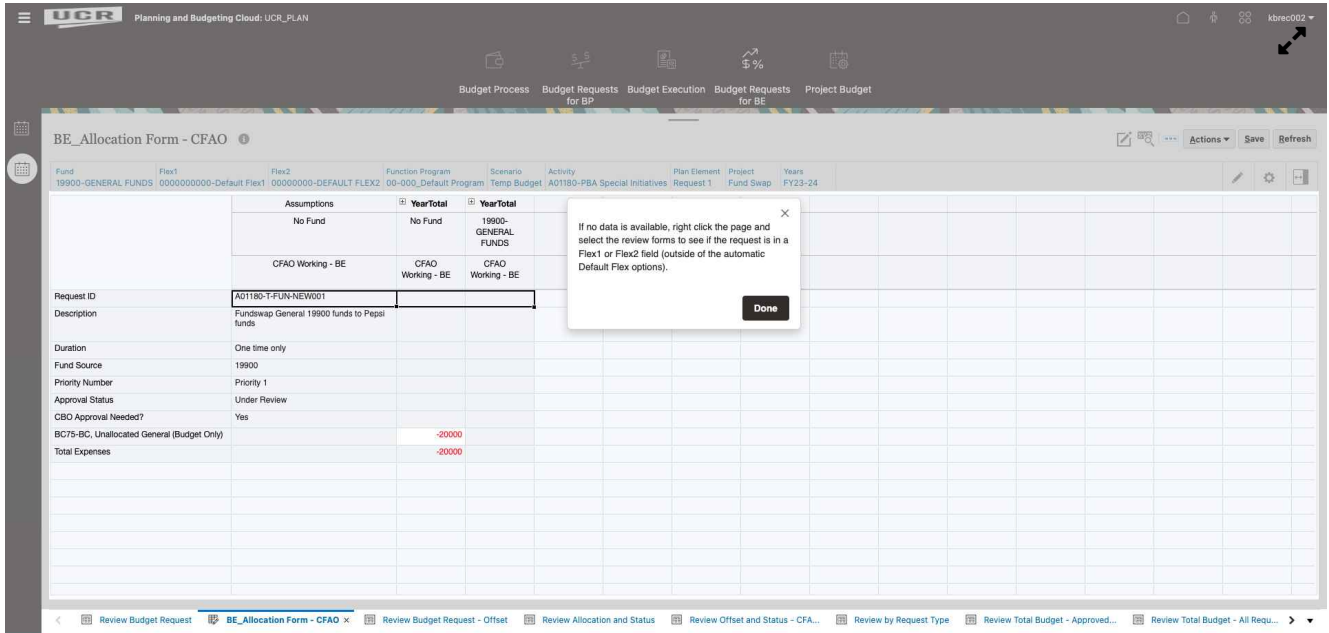
Select the second lefthand tab.

STEP 4

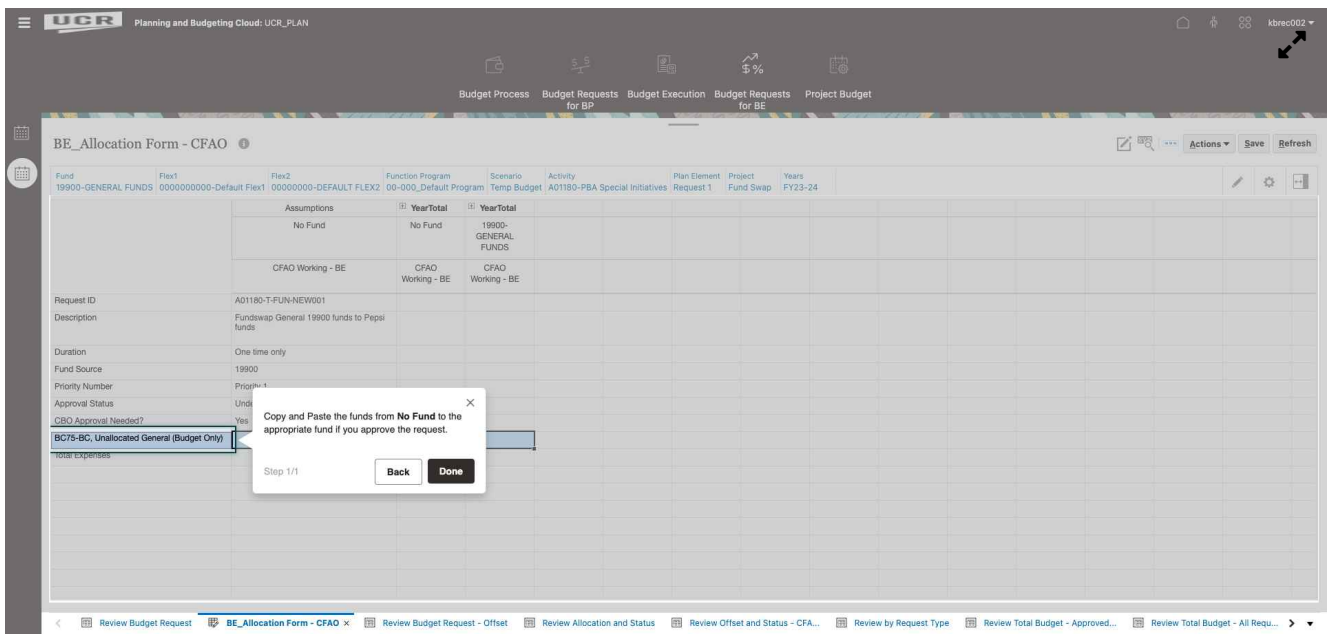Select your POV preferences.

STEP 5

Select your desired request and right click. Then click on the Allocation Form.
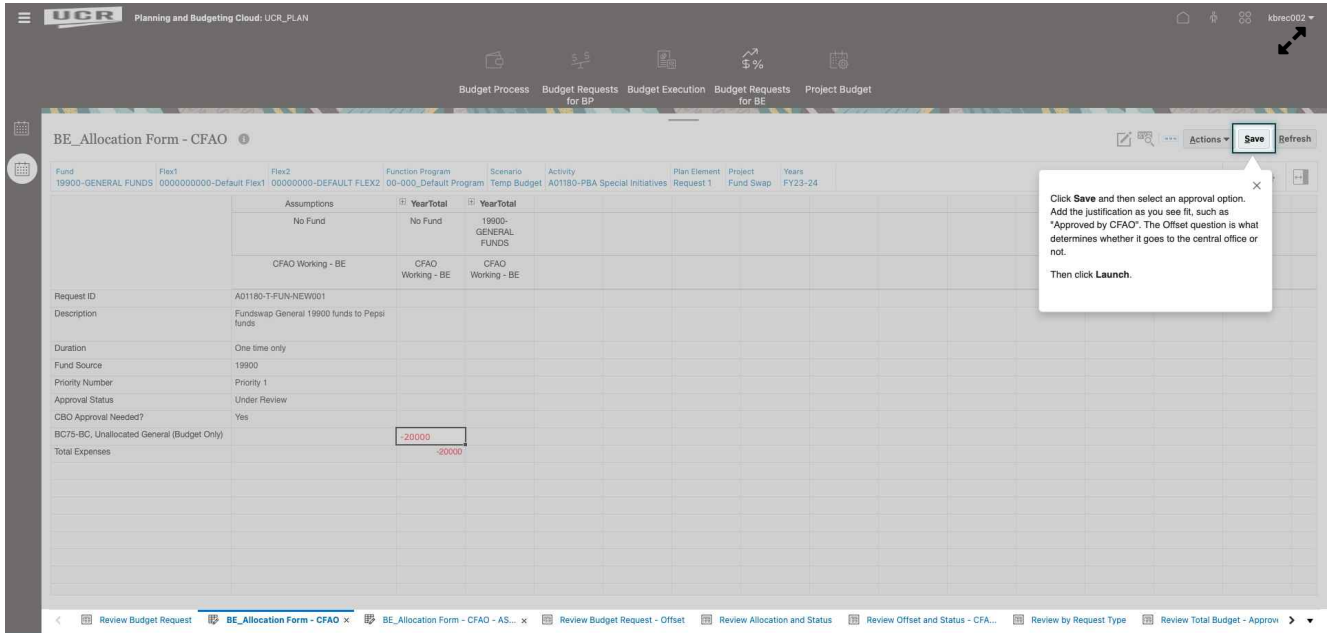
STEP 6

If no data is available, right click the page and select the review forms to see if the request is in a Flex1 or Flex2 field (outside of the automatic Default Flex options).

STEP 7

Copy and Paste the funds from the No Fund column to the appropriate fund column if you approve the request.
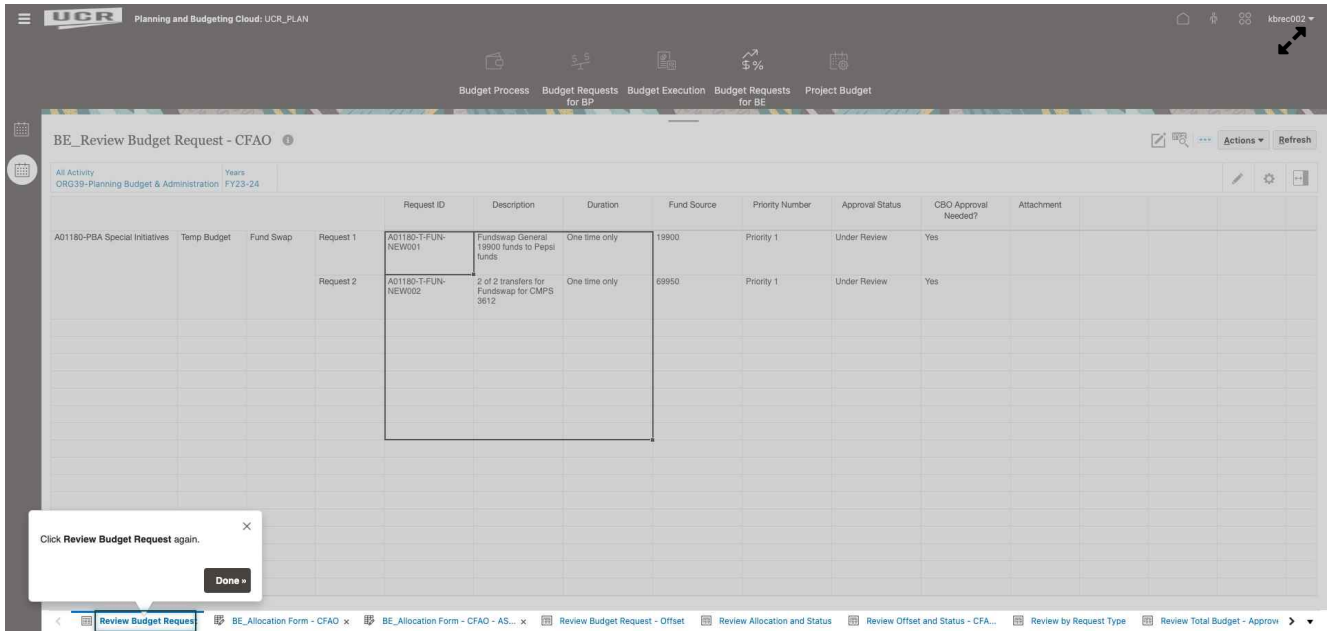
STEP 8

Click Save and then select an approval option. Add the justification as you see fit, such as "Approved by CFAO". The Offset question is what determines whether it goes to the central office or not.
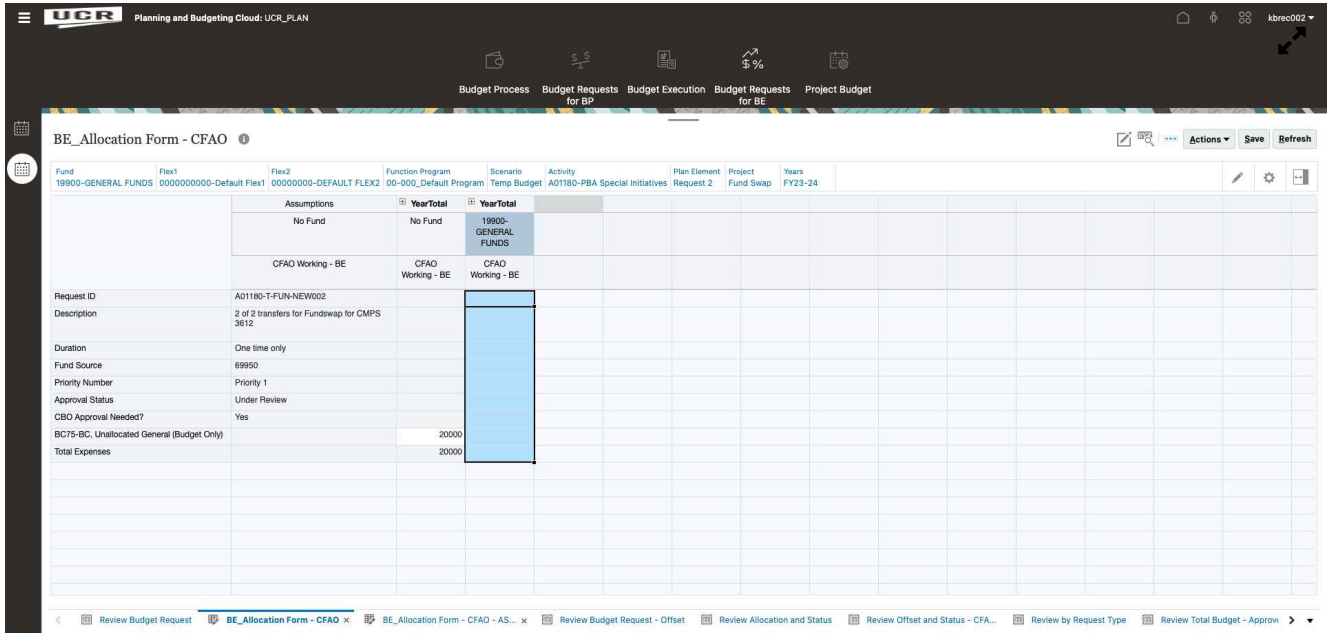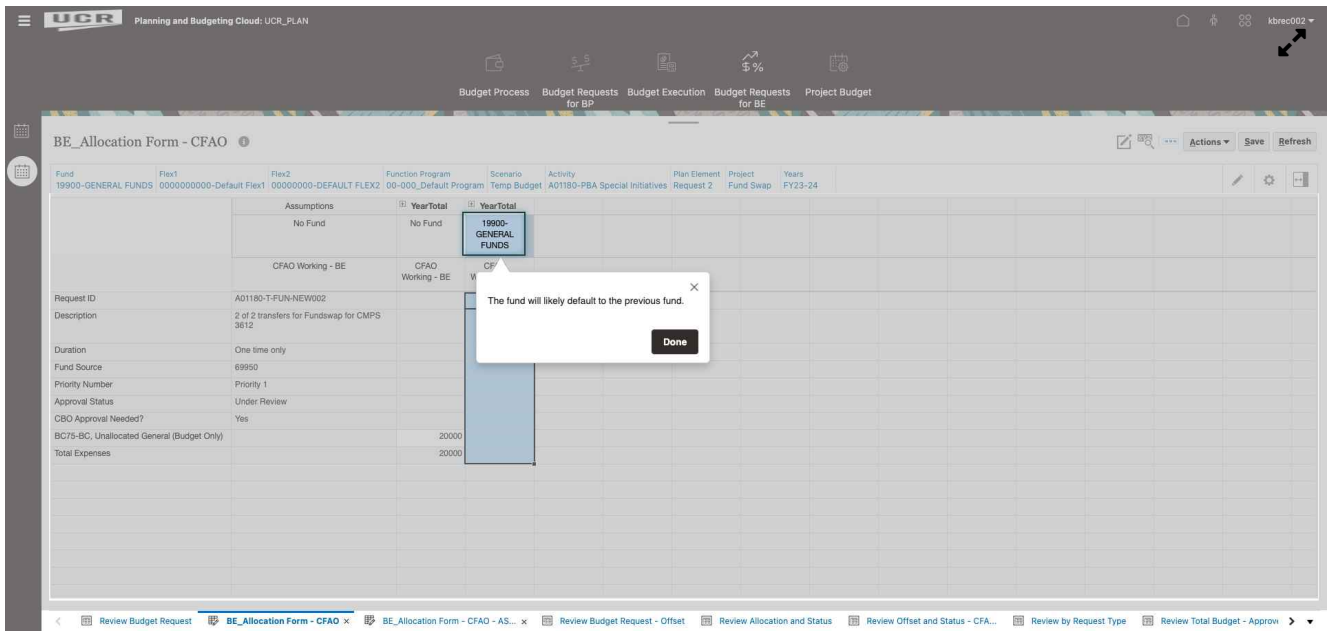
Then click Launch.
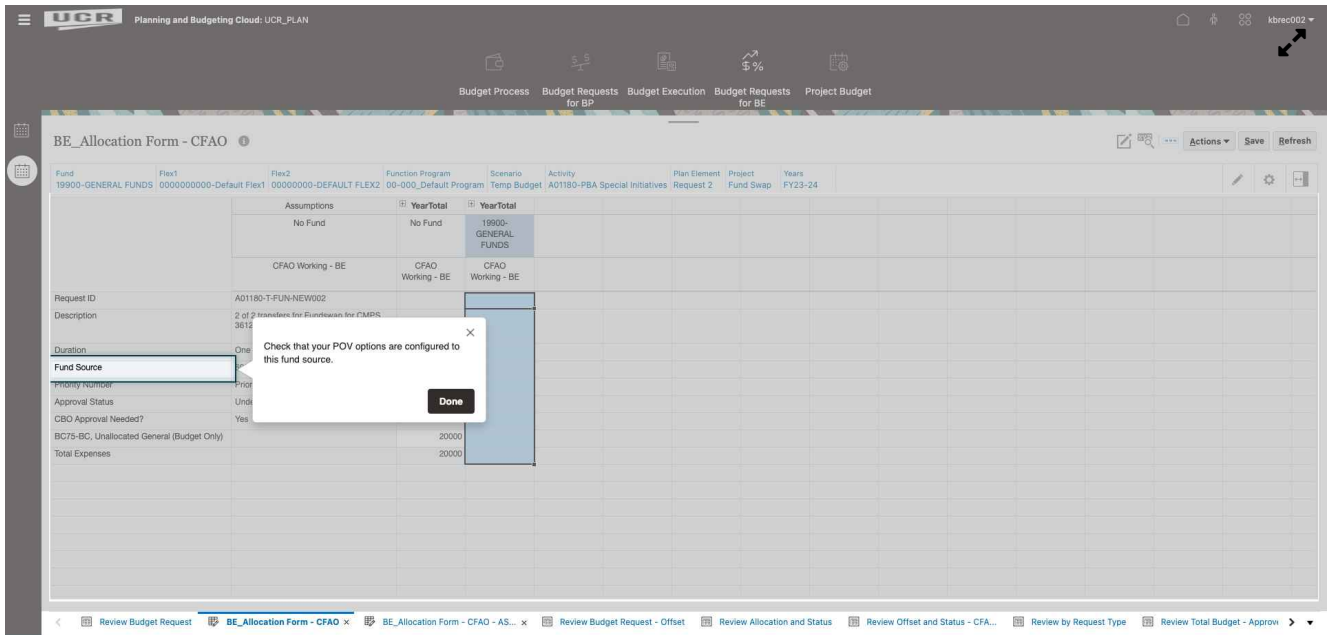
STEP 9

Click Review Budget Request again.

STEP 10

Right click the next request and click on the Allocation Form.
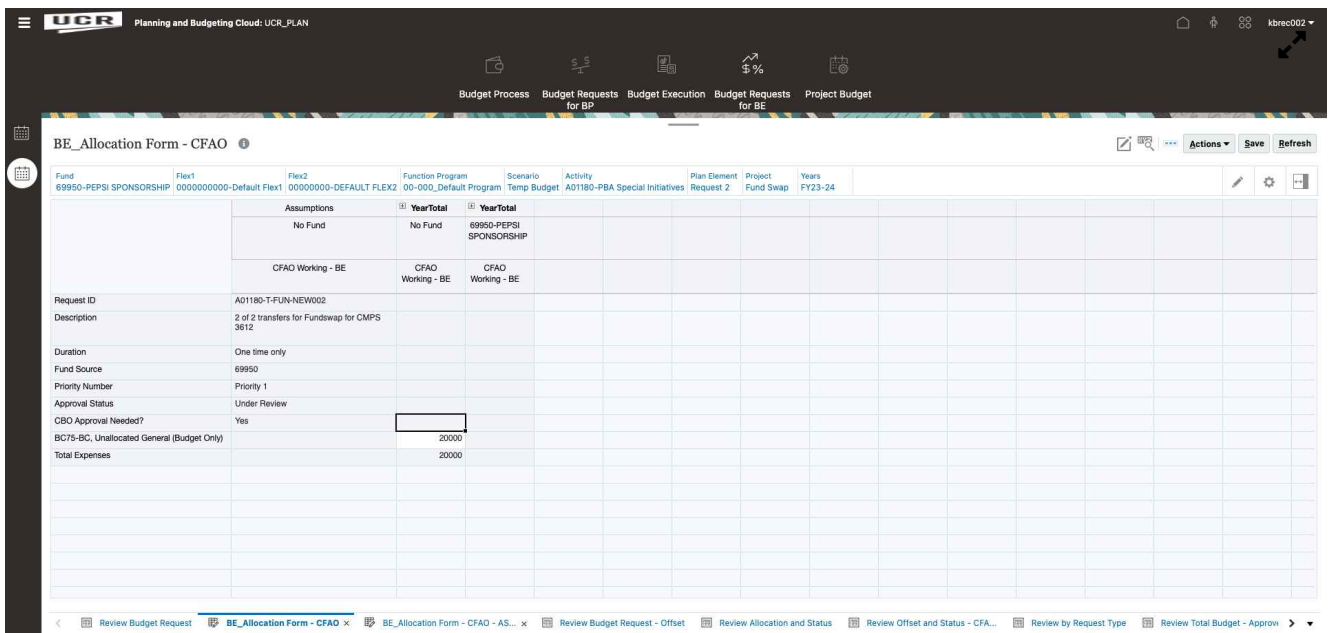
STEP 11

The fund will likely default to the previous fund.
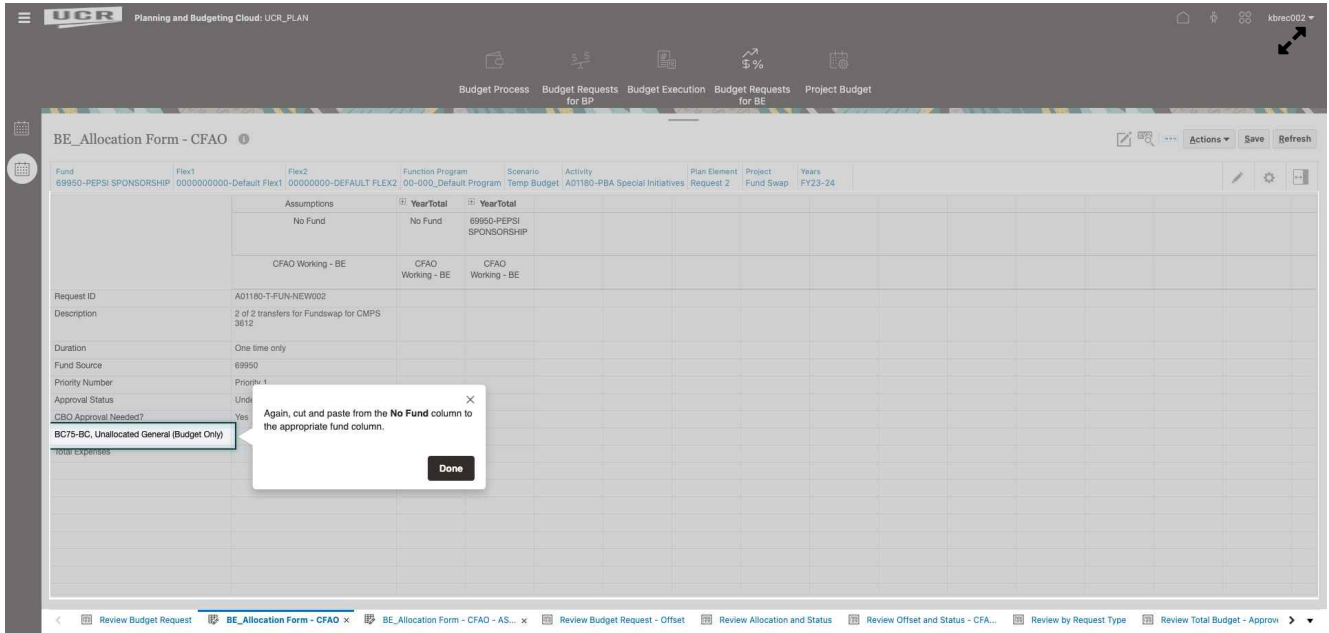
STEP 12

Check that your POV options are configured to this fund source.
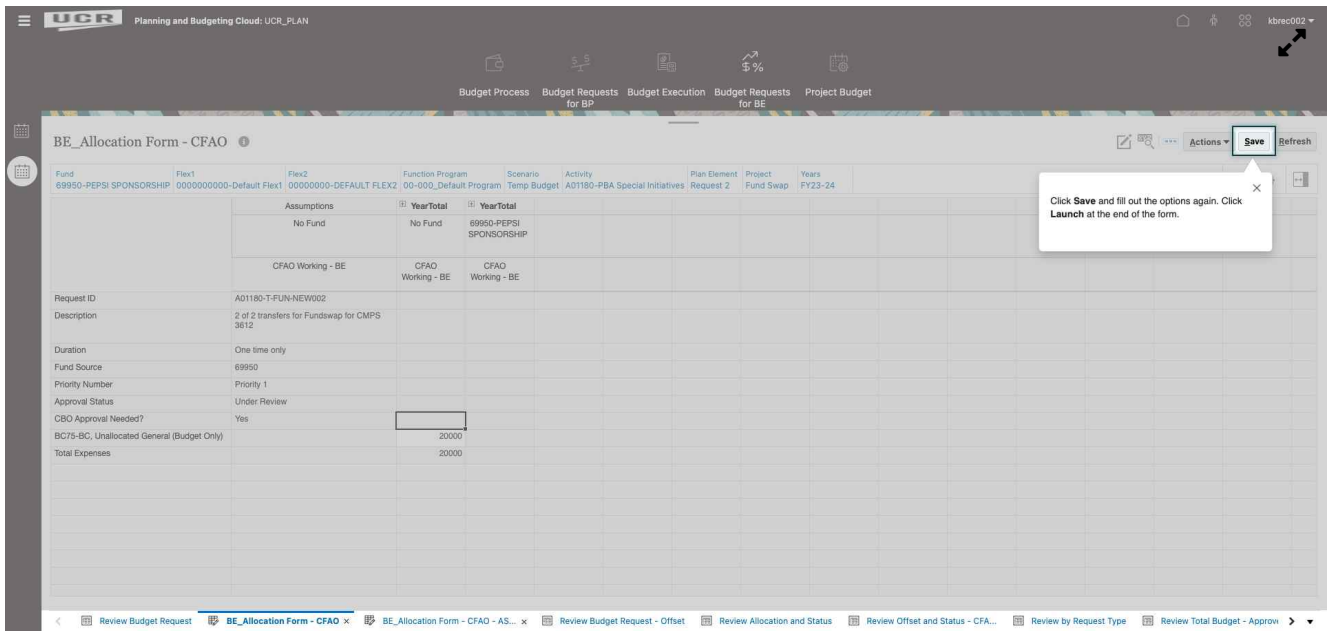
STEP 13

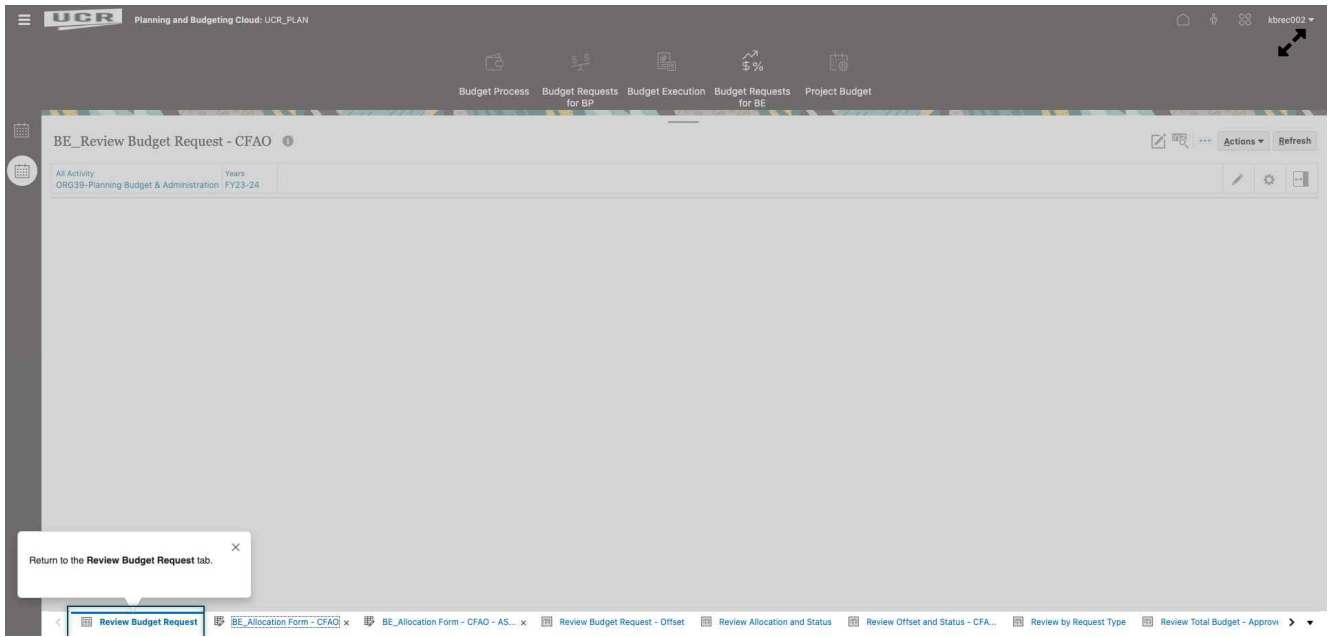**Configure the Fund at the top of the page.**

STEP 14

Again, cut and paste from the No Fund column to the appropriate fund column.

STEP 15

Click Save and fill out the options again. Click Launch at the end of the form.

STEP 16

Return to the Review Budget Request tab.

STEP 17

The approval status will now be updated.

You have successfully approved or denied a fund swap.