PST950
Budget & Commitment Control
a myUFL Training Course

Study Guide

UF | **Office of Human Resource Services**
Training and Organizational Development
UNIVERSITY *of* **FLORIDA**

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Introduction and Overview

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Definitions and Key Concepts

- The **myUFL System** is a collection of online services and business processes, which includes
    - The Portal
    - A Finance System
    - A Human Resources System
    - An Enterprise Reporting System
    - A Student Financials System

- **Security Roles.** Security role UF_FI_UNIVERSAL_INQUIRY allows you view only access to all financial modules; however does not allow budget transfers. Security role UF_KK_BDGT_TRANSFER_PROCESSOR allows you to perform budget transfers. This class is recommended prior to requesting UF_FI_UNIVERSAL_INQUIRY; however it is *required* prior to requesting UF_KK_BDGT_TRANSFER_PROCESSOR.

    Obtaining the UF_KK_BDGT_TRANSFER_PROCESSOR role also requires completion of PST952 Budget Transfer Processing, additional approval by the University Budget Office and is designated primarily for budget officers or their proxies. Those who do not complete budget transfers as part of their job duties will not be granted this role.

- **Commitment Control** (KK)
    - An accounting methodology in *myUFL* that identifies and reserves ("commits") funds for future payment obligations
    - Designated "KK" because "CC" = credit card in myUFL

- **Ledger Groups**
    - Provide information associated with the category of budget
    - Different **ledger groups** for different "categories" of budget available to departments
    - Different sources of funds, different "rules" associated with spending
    - For example, APPROP, CASH_BASED, KKGMCHD

- **Budget-Based Funds**
  - The distinction between *budget-based* funds and *cash-based* funds determines your "available spending authority"
  - Budget allocations funded from State Appropriations (including student tuition revenue) are made in lump-sum amounts by the University Budget Officer as determined by UF's RCM budgeting model
  - These allocations may be further allocated to colleges, centers, and divisions
  - Once the budget allocation has been made, these funds can be spent
  - Sponsored Projects also are considered "budget-based"
  - Think of budget-based funds as a credit line that has been extended and guaranteed to your department

- **Cash-Based Funds**
  - Available resources (operating budget amounts) are based on beginning cash balances, plus revenue, less expenditures and encumbrances
  - Includes Auxiliaries, Component Units, Returned Overhead and Residuals, as well as others
  - These funds can be spent only when the "cash" has been obtained
  - Think of this as the cash you have in your wallet —you must have the cash in your wallet in order to be able to spend it

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myUFL ChartFields

- **ChartFields** are the data entry fields that, *used in proper combination*, allow the completion of revenue and expense transactions within myUFL.
- **Budget Details Form**. Defining a Budget Search requires the entry of data into specific **ChartFields**.
- ChartFields **required** for all transactions
  - Business Unit
  - Department
  - Fund Code
  - Program Code
  - Account
- **Business Unit** ChartField (Required)
  - Sometimes called a "GL Unit" (General Ledger Unit) - UFLOR, for example
- **Department** ChartField (Required)
  - Department IDs have eight digits
  - Required for myUFL financial transactions
  - Used to identify your organizational structure
- **Fund Code** ChartField (Required)
  - Answers the question "Where does your department's money come from?"
  - There are 82 UFLOR Fund Codes from which to choose
    Fund Code Examples
    - 101   E&G Gen Rev, Main Campus
    - 102   E&G Gen Rev, HSC
    - 103   E&G Gen Rev, IFAS
    - 171   Transfer from Component Units
    - 201   C&G Federal Restricted
    - 209   C&G Other Restricted

- **Program Code** ChartField (Required) Answers the question "Why Are You Doing This?"
  - Examples:
    - 0100 Physical Plant Admin
    - 0500 Custodial Services
    - 1100 Instruction & Research
    - 2200 Individual/Proj Res
    - 4400 Computing Supp
    - 4600 Academic Admin
    - 6100 University Supp
- **Account** ChartField (Required)
  - Answers the question: "What are you doing?"
  - Used to specify the classification of activities
  - Six-digit code
  - Account ChartField value that begin with:
    1 represents Assets
    2 represents Liabilities
    3 represents Fund Equity
    4 represents Revenue, Operating
    5 represents Revenue, Non-Operating
    6 represents Expenses, Personnel Operating
    7 represents Expenses, Other Operating
    8 represents Expenses, Non-Operating
    9 represents Statistics & Self-Balancing
- **Dept Flex** ChartField is required with these Fund Codes:
  - 131 FIN AID UNRESTD-INSTITUTIONA
  - 143 AUX - DOCE FUND
  - 162 MATERIAL & SUPPLY FEE
  - 163 AUX – EQUIPMENT USE FEE FUND
  - 192 CONCESSION Fund   and others...
- **Source of Funds** ChartField is required with these Fund codes:
  - 171 C&G - TFTS FR COMPONENTS
  - 201 C&G FEDERAL RESTRICTED
  - 213 UFRF ALLOCATIONS   and others...
- Fund Codes 201, 209, 211, 212, 213, and 214 require these additional ChartFields:
  - Project
  - PC Business Unit - GRANT
  - Activity ID (for grants = "1")

For more information on Chartfields… http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/chartfields/

Commitment Control: Fundamentals

- **Commitment Control** is a function of myUFL
  - Used to control commitments and expenditures automatically by checking them against predefined, authorized budgets
  - Will stop transactions that would exceed budget
  - Designed to answer: "What is my available spending authority?"
  - Track the following against a designated budget
    - Encumbrances
    - Expenditures
  - The Cycle for financial transactions:
    - PURCHASE ORDER: KK creates an encumbrance
    - VOUCHER: KK relieves the encumbrance, creates an expenditure
  - In general, Commitment Control ("KK") answers the question: "What is my *available spending authority?*" If you do not have sufficient budget, the process will be stopped

- **Ledger Groups**
  - State Appropriation   APPROP
  - Cash-Based   CASH_ BASED
  - Grants   KKGMCHD
  - Construction   CONST
  - Student Government   STUGOV

- Each ledger group calculates available **Spending Authority**, or your "Available Spending" balance
  - Related to FUNDING SOURCES, each with a different set of "rules" for spending
- Different Funding Sources are grouped under the same ledger group (Figure 1).

APPROP Ledger Group
FL
- **State Appropriations**

CASH_BASED Ledger Group
- **Component Units** CU
- **Auxiliaries** AUX
- **Returned Overhead** R
- **Cost Sharing** CS

KKGMCHD Ledger Group
- **Sponsored Projects** SP

CONST Ledger Group CP
- **Funds for Capital Projects**

STUGOV Ledger Group
- **Activity & Service Fee**
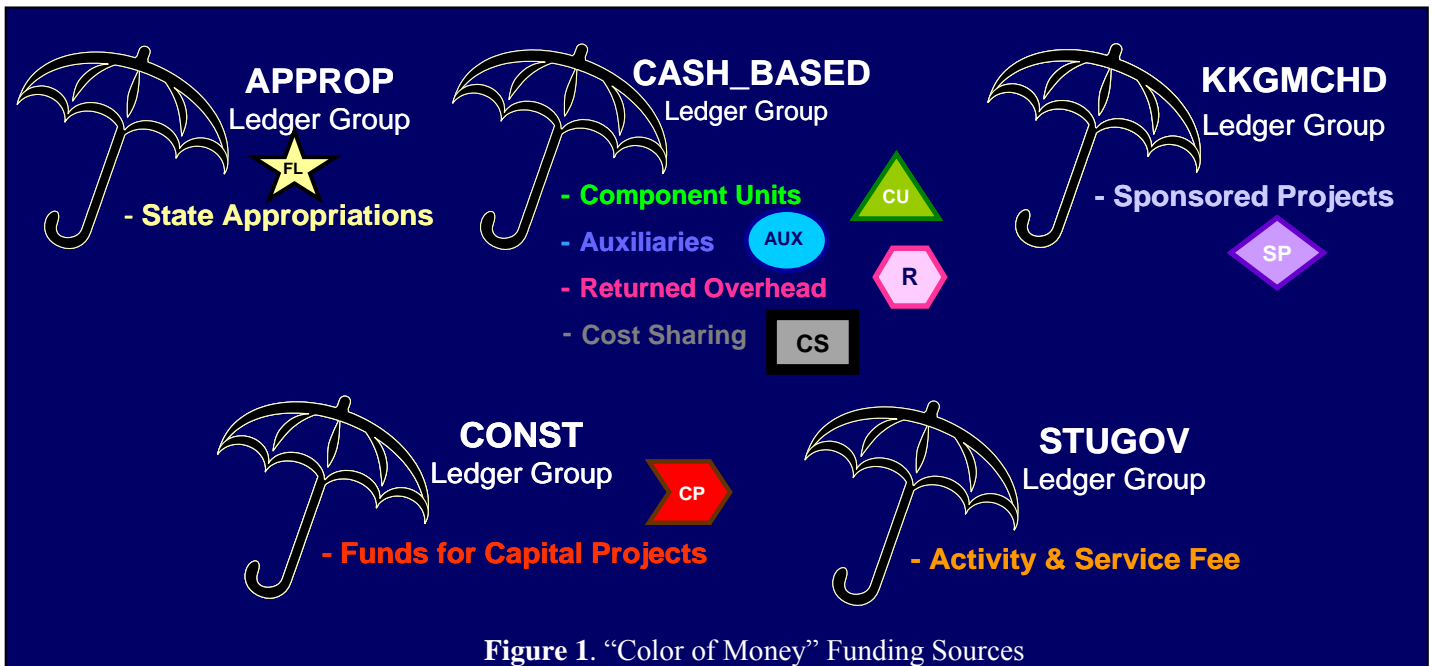
Figure 1. "Color of Money" Funding Sources

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
State of Florida Legislature This funding comes from state taxes, fees, and other sources of state revenue	State Appropriation E&G—Education and General General Revenue State Funds	**Fund Code 101:** E&G, Gen. Revenue, Main Campus **Fund Code 102:** E&G, Gen. Revenue, HSC **Fund Code 103:** E&G Gen. Revenue, IFAS **Fund Codes 401-403** Cost Sharing E&G Gen. Revenue	**APPROP**

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Student Tuition This funding comes from the payment of a student's in-state tuition and their out-of-state fee, as appropriate	State Appropriation E&G—Education and General State Funds	**Fund Code 121:** Student Fees, Main Campus **Fund Code 122:** Student Fees, HSC	**APPROP**

FL

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Lottery Funds (Educational Enhancement Trust Fund)	State Appropriation E&G—Education and General State Funds	**Fund Code 111**: Ed Enhancement, Main Campus **Fund Code 112**: Ed Enhancement, HSC **Fund Code 113**: Ed Enhancement, IFAS	**APPROP**

SP

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Sponsored Projects Federal and non-federal contracts and grants are awarded to UF faculty designated as principal investigators (PIs) responsible for the funded research activity	"Project" is the ChartField used to identify activity associated with sponsored projects or programs	**Fund Code 201**: C&G Federal Restricted **Fund Code 209**: C&G Other Restricted (Non-Federal)	**KKGMCHD**

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Returned Overhead / Residual Funds This funding comes from indirect cost recovery or unused funds from Federal and Other Restricted Grants	IDC (Indirect Cost) Returned Overhead Residual	**Fund Code 211**: Returned Overhead **Fund Code 212**: Residual Funds	**CASH_BASED**

CS

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Cost Sharing This funding comes from indirect cost recovery or other restricted and unrestricted funds allowed to be used as cost sharing	Cost Sharing	**Fund Codes 420 & 425**: Cost Sharing Non-E&G Restricted and Unrestricted	**CASH_BASED**

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Component Units (CUs) A variety of outside sources fund CUs to support UF, which can be Direct Support Organizations (DSOs) or other affiliates (not-for-profit corporations)	<u>Example #1</u> UF Foundation or (UFF) funding comes from fundraising, donations, and other investments	**Fund Code 171**: Transfer from Component Units **Fund Code 471**: Cost Sharing Transfer from Component Units	**CASH_BASED**

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Component Units (Continued) This revenue comes primarily from patient fees for services provided by UF clinics	<u>Example #2</u> The Faculty Practice Plans—also known as the Clinical Practice Plans—are affiliates that fund the Academic Enrichment Fund (AEF)	**Fund Code 171**: Transfer from Component Units	**CASH_BASED**

CU

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Component Units (Continued) This DSO receives royalties from licenses for UF discoveries as a result of research efforts and grants from private industry and foundations	<u>Example #3</u> UF Research Foundation (UFRF)	**Fund Code 213**: UFRF Allocations	**CASH_BASED**

AUX

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Sale of goods and services to customers - employees, departments, students, members of community	**Auxiliaries** are UF entities that are generally self supporting and charge for services Examples include the Physical Plant Div. and Tele-communica-tions	**Fund Code 149**: Aux-Other Funds **Fund Code 159**: RCM Support Unit Fund **Fund Code 151**: Aux-Working Capital (Physical Plant)	**CASH_BASED**

CP

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
State, private, and university sources provide funding for **capital projects**— new construction and major renovations of buildings	**State Approp Non-operating** Capital Improvement Trust Fund (CITF) Transfers from component units, PECO— Public Educ'n Capital Outlay	**Fund Code 5XX**	**CONST**

Funding Source	UF Lingo	Designated Fund Code ChartField	Ledger Group in KK
Student Government fees, which are collected by University Financial Services as a component of tuition	Student Activity and Service (A&S) fees are administered by the Div of Student Affairs and are allocated by Student Senate to the needs of student groups	**Fund Code 191**: Student Government Funds	**STUGOV** (function similar to APPROP)

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KK Budget Inquiry: State Appropriations

- **State Appropriations** (Figure 2): Funding is allocated into three "buckets" of funding (account codes):
    - KK – Salaries
    - KK – OPS
    - KK – Other Expenses
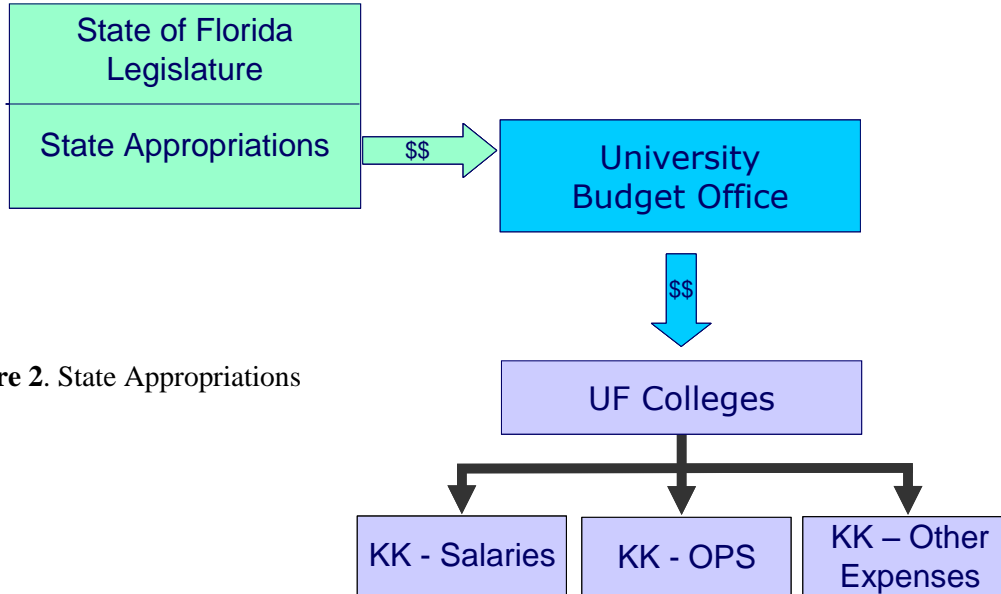
Figure 2. State Appropriations

- **SALARIES** and **OPS** commitments are *not* **encumbered**.
    - Projected Payroll Reports are provided
        - Based on amount of employee's current earnings
        - Based on the Fringe Benefits Pool rate of the employee's Salary Admin Plan
    - Payroll expenses will be posted even if a balance is not available
        - Negative balances must be corrected immediately

- **OTHER EXPENSES** are *encumbered* via processes associated with vendor relations
    - Spending is restricted via a "budget check" process
        - Before purchase order is issued
        - Before a voucher is issued

- **Please NOTE**:
    - If you do not have sufficient budget to proceed at any of these points…
    - the process will be stopped until you acquire the needed funds

- **For State Appropriations**:   Budget
        Less: Encumbrances (purchase orders and travel authorizations)
        Less: Expense (vouchers, JE, payroll, expense rpt)

        = Funds Available to spend

- In myUFL, you can gain access to information about your budget via **"Commitment Control"**
  - Follow the path:
    Commitment Control → Review Budget Activities → Budget Details

- On the **Budget Details** form (Figure 3), enter ChartField information associated with your department to define your search
  - Business Unit (UFLOR) is provided by default.
  - For Ledger Group. Click on the Look Up button or type "A" to activate Type Ahead functionality.
  - Click on "APPROP" to enter the Ledger Group value.
  - We can select one of three "Account" ChartField values for State Appropriations:
    - 600000 - Salaries
    - 650000 - OPS
    - 700000 - Other
  - In the Department ChartField, let's use: "2101"
  - Let's use the Lookup icon to search for the Fund Code.
    - Fund Code: – answers the question: "Where does the money come from?"
  - In the Budget Reference: ChartField, let's enter: "CRRNT"
    - Note: Budget Reference answers the question "When did I receive this money?"
    - CRRNT = spending occurs in the FY in which it was budgeted.
    - CYFWD = unexpended balances at end of FY are carried forward and budgeted in next FY. Same restrictions as state appropriations, but not used for recurring expenses.

  - In the Budget Period: ChartField, enter: "2015"
    - **Note: BUDGET PERIOD** is typically based on Fiscal Year, but some funding sources use other references.

- Click: **Search** at the bottom of the Budget Details form to see "Search Results" table (Figure 3).

Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit: = ▼ UFLOR 🔍
Ledger Group: = ▼ APPROP 🔍

[Search] [Clear] Basic Sea

Budget Detail Overview

Budget Inquiry Criteria

Select Budget Detail

Business Unit	Ledger Group	Account	Department	Fund Code	Program Code	Budget Reference	Budget Period
UFLOR	APPROP	700000 🔍	21010000 🔍	101 🔍	🔍	CRRNT 🔍	2015 🔍

[Search]

Budget Details

Personalize | Find | View All | 🔲 | 🖩   First ◀ 1 of 1 ▶ Last

	Business Unit	Ledger Group	Account	Department	Fund Code	Program Code	Budget Reference	Budget Period	View Details
1	UFLOR	APPROP	700000	21010000	101		CRRNT	2015	View Details

Choose the desired record from the Search Results screen. Then click the View Details link to display **Budget Details** screen.

- Budget Inquiry gives you information about your balances in the ***Budget Details*** page (Figure 4)

  o ChartFields
  o Budget = Allocated Amount
  o Expense = What you've spent
  o Encumbrance = What you're in the process of spending – POs, TAs, etc.
  o Pre-encumbrance = No longer used
  o "Without Tolerance" is set by the University
  o "Exception Errors" indicates the number of line items within transactions that currently have budget exceptions.
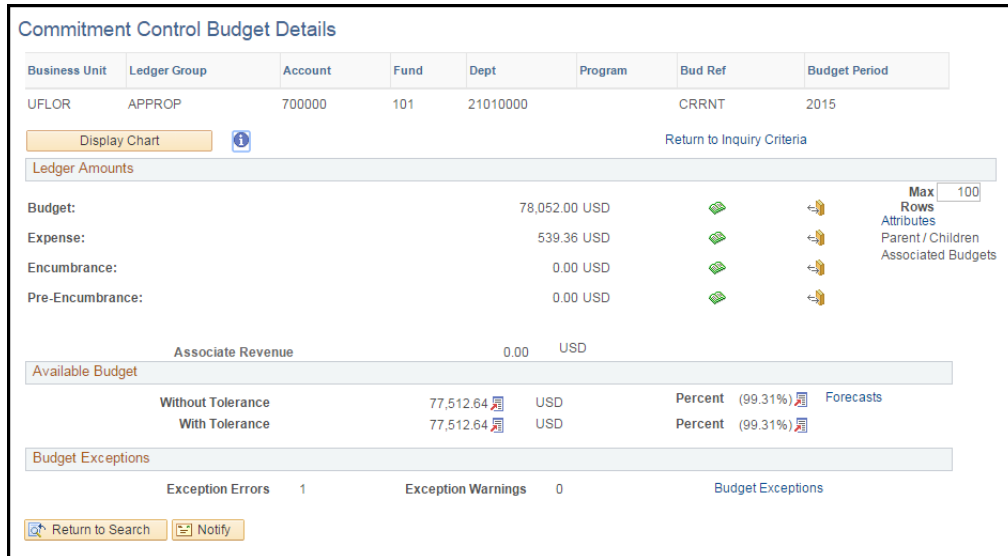
Figure 4. Budget Details Report

Click: **Drill to Ledger** icon

- The Ledger provides information about your balance by FY and accounting period (month)
- Click: "**Show All**" icon to show all columns
- Accounting Period: 1 = Jul; 3 = Sep
- Click: **Drill Down** twice to see transaction line details (Figure 5)
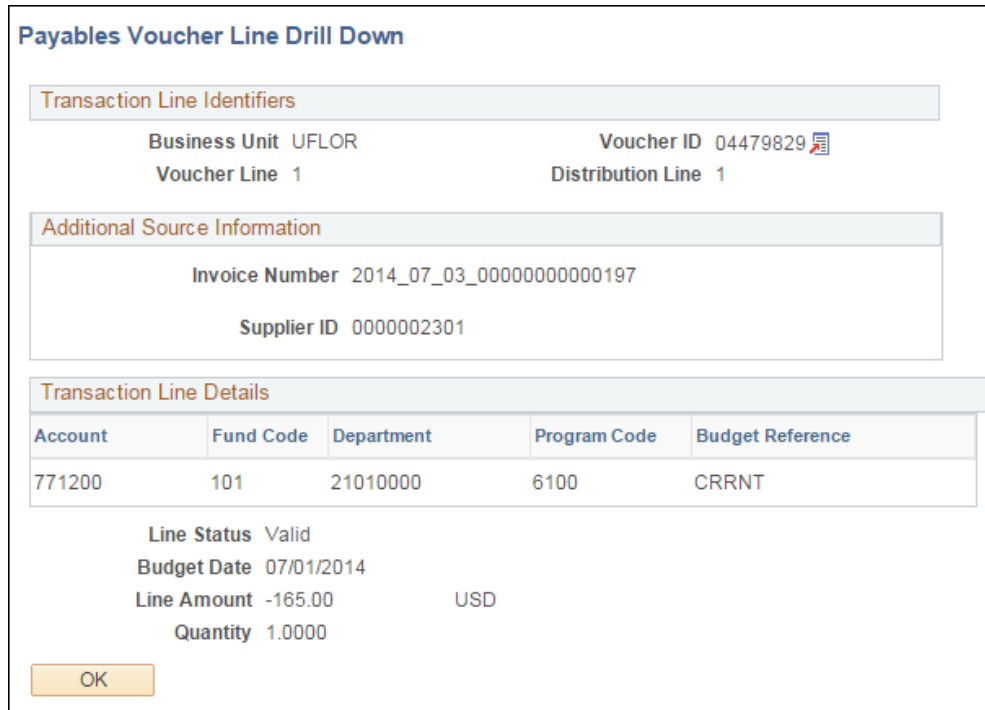
Figure 5. Payables Voucher Line Drill Down

Click: **Drill to Activity Log** icon
- Activity Log displays KK transactions and detail amounts starting at the beginning of the fiscal year
- Click: **Drill Down** icon
- Click: **View Related Links** icon
- Click: **Go to Source Entry** link to view actual voucher

| Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary |

Business Unit UFLOR
Voucher ID 04479829
Voucher Style Regular
Supplier Name MBNA America (Delaware) NA
    dba FIA Card Services
    Acct number 4715697000001140
    507 Pleasanton Rd   Ste 101
    San Antonio, TX 78214

Entry Status Postable
Match Status No Match
Approval Status Approved
Post Status Posted

Budget Status Valid
Budget Misc Status Valid
View Related Payment Inquiry

Invoice Date 06/26/2014
Invoice No 2014_07_03_00000000000197
Invoice Total -585.00   USD
Pay Terms Net 10
Voucher Source Procurement Cards

Origin ONL

Created On 07/07/2014 12:00AM
Created By 53348540
Last Update 07/08/2014 12:00AM
Modified By 72821890
ERS Type Not Applicable
Close Status Open

Go

Return to Search | Notify | Refresh

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary

Figure 6. Budget Journal Line Drill Down

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KK Budget Inquiry: Grants

- **For Grants**:   Budget

               Less: Encumbrances (purchase orders and travel authorizations)

               <u>Less: Expense (vouchers, JE, payroll, expense rpt)</u>

               = Funds Available to spend

- For **Grants Ledger Group**
  - Depending Upon Fund Code
    - KKGMCHD or… Cash_Based

- **Navigation**: Commitment Control → Review Budget Activities → Budget Details
- **Budget Details** form is displayed - define the search (Figure 7).

Business Unit = UFLOR

Ledger Group = KKGMCHD

Department ID

Fund Codes = 201, 209

Project

Figure 8. Search Results table

Click **View Details** to display Details screen.

Figure 9. Budget Details screen

- Click: **Attributes** link to see **Budget Detail Attributes** (Figure 10).
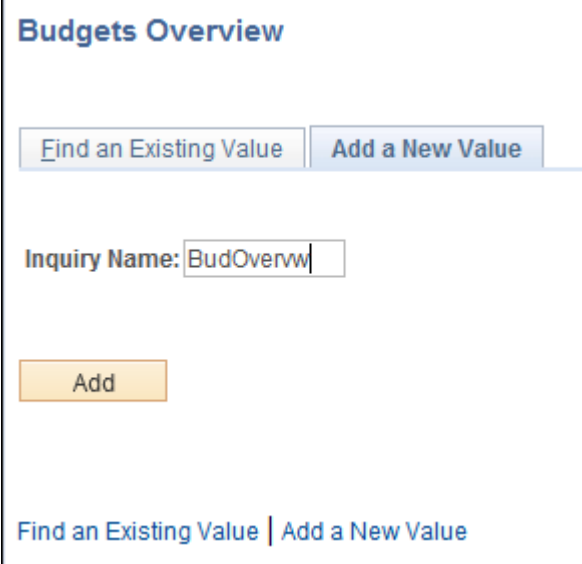
Figure 10. Budget Details Attributes

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Commitment Control: Budgets Overview

- **Navigation**: Commitment Control → Review Budget Activities → Budgets Overview
  to display Budgets Overview tabs (Figure 11).

- On the **Add a New Value** tab:
  - Enter an Inquiry Name
  - Click: **Add** to display the **Budgets Overview** form (Figure 11).

Budgets Overview

Find an Existing Value | Add a New Value

Inquiry Name: BudOvervw

Add

Find an Existing Value | Add a New Value

Figure 11. Budgets Overview tabs

- Provide the following values:
  - **Description**:   This is a description
  - **Ledger Group**: Click **Ledger Group** Look Up or use **Type Ahead**, select the **KKGMCHD**
    line
  - Enter/Lookup **FUND_CODE**: 201
  - Enter/Look Up **PROJECT_ID**: 00117011
  - Deselect "**Closed**"
  - Deselect "**Hold**"
- Click: **Search** (Figure 12) to execute the search.
- Change maximum number of rows to at least 500
- Click: **Search** again (Figure 13) to view Budget Overview results

Figure 12. Budgets Overview form

Inquiry Results

Business Unit UFLOR
Ledger Group KKGMCHD
Type of Calendar Detail Budget Period
Amounts in Base Currency USD
Revenue Associated: ☐

Change **Max Rows** to at least "500"

Return to Criteria   Max Rows 500   Display Options   Search

Click: **Search** to display Budget Overview Results

Ledger Totals (2 Rows)

Budget	105,000.00	Net Transfers	0.00
Expense	3,421.87		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	101,578.13		
Associate Revenue	0.00		
Available Budget	101,578.13		

Budget Overview Results

Personalize | Find | View All | 🗗 | 🖩   First 1-2 of 2 Last

		ct	Activity	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1		7011	1	CUM	74,713.000	3,370.590	0.000	0.000	71,342.410	95.49
2		7011	1	CUM	30,287.000	51.280	0.000	0.000	30,235.720	99.83

Return to Criteria   *Notes

Personalize | Find | View All | 🗗 | 🖩   First 1-2 of 2 Last

Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
74,713.000	3,370.590	0.000	0.000	71,342.410	95.49
30,287.000	51.280	0.000	0.000	30,235.720	99.83

Figure 13. Budget Overview Results

Budget Amount

Total Expenses

Available Budget

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Checking Budget Exceptions

- **Two methods** to check Budget Error Exceptions:
    1. Via Commitment Control
    2. Drilling down from Budget Inquiry

- **Definition**: Budget Error Exception
    - A transaction that fails budget checking, causing an error or warning to be issued.

- **Method 1**. KK Review Budget Check Exceptions (Figure 14)
    - Commitment Control → Review Budget Check Exceptions → Budget Exceptions
    - Budget Exceptions form: Enter **Ledger Group** and any other information you have and click **Search**. Leave other fields blank for a list of all values.

Figure 14. Commitment Control Budget Exceptions form

Method 2. **KK Budget Details**
- o Commitment Control → Review Budget Activities → Budget Details
- o Displays **Budget Details** page (Figure 15).

Figure 15. Budget Details screen

Figure 16. Budget Exceptions screen

Manager Self Service: Notify Preferences

- You can decide when and how to be notified of *exceptions*; three examples of exceptions:
    1. "Exceeds budget tolerance"
    2. "No budget exists"
    3. "Non Key CF Exception"
- Also can be notified when a specified percentage of budget has been spent
- **Navigation**: Manager Self Service → Budgets → Notify Preferences
- Click: **Advance Search** to display the Advance Search screen (or use **Type Ahead)** (Figure 17)
- Click: **Search** icon to display Look Up Budget Type window
- Click: **Look Up** button to display search results.
- Select: Appropriations from Search Results table to display form for selecting Alert Level (Figure 18)
- Confirm "**Advanced**" is checked
- Click: **Add a Budget Alert** button (Figure 19)
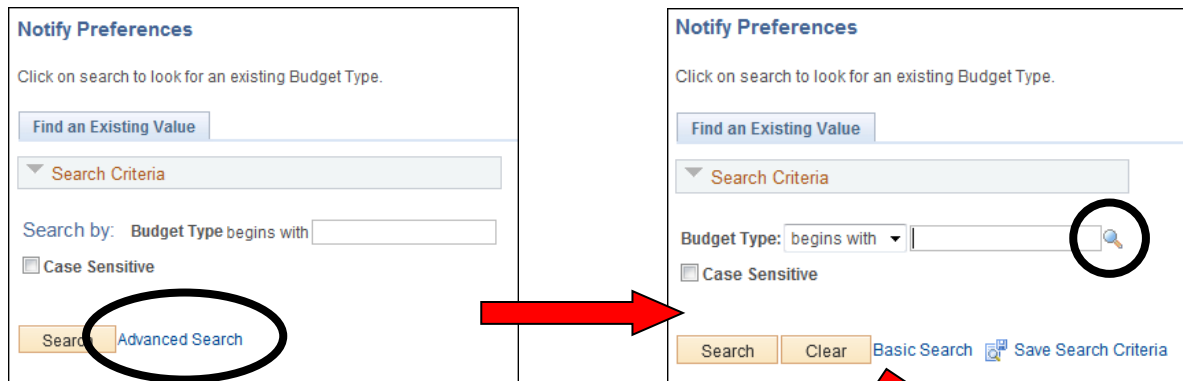
Figure 17. Notify Exceptions screen
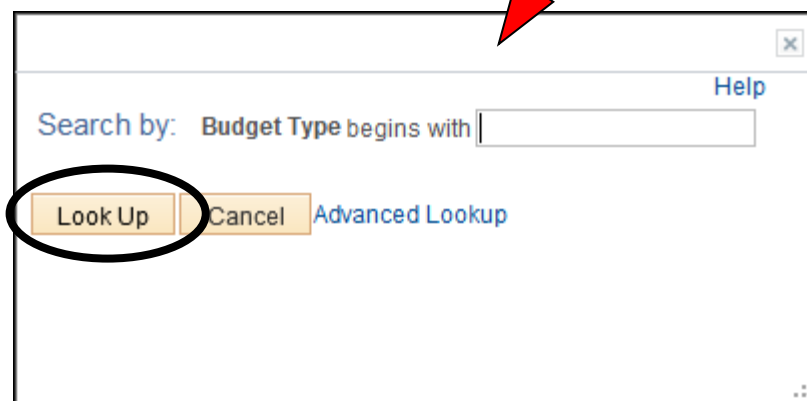
Figure 18. Notify Preferences navigation

Figure 19. Form to select Alert Type

- Refer to Figure 20 for these steps:
  - Specify the budget item combination of **ChartFields** to receive the exception information required.
    - Fields must contain the full ChartField values or you may choose to use "wildcard" (%) independently for all fields *except* Department.
  - Set checkbox to receive notification when 75% of budget has been used.
  - Deselect the "Send me Alerts via Worklist" option.
  - Select the "Send me Alerts via Email" option.
- Return to Budget Search page and click: **Save Budget Overrides** (Figure 21).

Figure 20. Set Notification Preferences for specified budgets

Figure 21. Save Preferences

Commitment Control: Cash-Based Budget Inquiry

- Two components:
    - Available to encumber (make commitments)
    - Available to disburse

For Cash-Based:

Beginning Cash Balance
Collected Revenue

Less: Actual expenditures (payroll, vouchers, expense reports, etc.)

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= Funds Available to spend

- Budget Details form (Figure 22):
    - Account: EXPREV
    - May enter just the **first four digits** of your **Department** ID to specify the search
    - Cash is controlled at the division/subdivision

Note Account: **EXPREV**

Figure 22. Budget Details form

- **Budget Details** report page (Figure 23):
  - ChartFields
  - Ledger Amounts
    - Don't be distracted by the *negative value*. Your available budget listed below is what's important.
    - Your **encumbrances** will be tracked here, but they will not affect your cash.
    - Of course, the cash balance will be affected once the funds are spent.
  - Available Budget
    - At the beginning of the year, **Available Budget** will be based on your ending cash balance. It will increase as you make deposits, and will decrease as you spend.
  - Budget Exceptions - indicates the number of line items within transactions that currently have cash exceptions

Don't be distracted by the *negative value.* Your available budget listed below is what's important.

Encumbrances will be tracked here, but will not affect your cash.

At the beginning of the year, **Available Budget** will be based on your ending cash balance. It will increase as you make deposits, and will decrease as you spend.

Figure 23. Budget Details report

Summary and Conclusion

- Introduced *Commitment Control*
    - An accounting methodology in myUFL that identifies and reserves ("commits") funds for future payment obligations
    - It checks to make sure you have funds for intended expenditures

- **Q**: What abbreviation do we use for Commitment Control? **KK**

- **Q**: Why not CC? Because CC in myUFL indicated "Credit Card"

- **Q**: Which ledger groups did we discuss today? **APPROP, KKGMCHD and CASH_BASED**

- **Q**: What is the navigational path that begins your inquiry about your budget? **Commitment Control >**

  Review Budget Activities > Budget Details

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Budget & KK Toolkit

- Located at: http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/budget-and-commitment-control/
- Web Simulations:
    - Budget Inquiries
    - Budgets Overview
    - Budget Exceptions
    - Manager Self Service
    - Budget Transfer
    - Upload Budget Transfer
    - Displaying Charts
- Instruction Guides
    - *Completing a KK Budget Inquiry: Grants*
    - *Completing a KK Budget Inquiry: APPROP*
    - *Completing a KK Budget Inquiry: Cash-Based*
    - *Completing a KK Budget Overview*
    - *Completing a Budget Transfer*
    - *Completing an Upload Budget Transfer*
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    - *Displaying Charts*
    - *Where Are My Available Balances? – Search Tips*

- Training – Related courses and how to register
- Security Roles – For Budget & KK functions in myUFL
- Other Helpful Information
- Contact Information

Contacts

- Contact the University Budget Office at: 352-392-2402

- For technical issues, contact the UF Help Desk at: 352-392-HELP