

MyPortal SSB9 Budget Transfer Instructions

1. Log into MyPortal via <https://experience.elluciancloud.com/clpccd/>
2. Click on “My Finance” under the **Self Service (SSB9)** card
 - a. If you do not have this card, click on  on the bottom-right and search “SSB9” to add the card to your homepage.



3. Click on 
4. Click on  to start a new Budget Transfer. While SSB9 refers to this process as a “journal,” these instructions will refer to this process as a Budget Transfer.
 - a. On the **Create Journal** popup window, edit the following (see **Exhibit A**)
 - i. **Transaction Date:** leave as today’s date unless you need to backdate. Check with the Business Office *before* backdating entries.
 - ii. **Journal Type:** “SSBT”
 - iii. **Description:** always start with “BT:” then enter a general description
 - iv. **Budget Period:** must always coincide with the month in the **Transaction Date** field above (1 for July, 2 for August, 3 for September, etc.)
 - v. **Public or Private Comments:** you may use these to include notes if you wish, but it is not required, nor is it typically reviewed by Administrative Services.
 - vi. Once done, click  at the bottom of the window
 - vii. **Note: Distribution Total** should be left blank. This amount will automatically calculate.
5. The next popup window (See Exhibit B) is used to enter the details for a single line/sequence in the BT. Only some fields need to be filled out, and other fields should never be used. Some fields will be pre-filled if you entered the information as directed in Step 4 of these instructions. Any fields not indicated below should be ignored. **Note:** when entering some fields, you may need to wait for the value to appear in the dropdown below the field before moving on to the next field. Tabbing or clicking to the next field too quickly will result in a blank field.
 - a. **Journal Type:** “SSBT”
 - b. **Chart:** “1”
 - c. **Fund:** Enter the first Fund code for your BT
 - d. **Organization:** Enter the first Org code for your BT
 - e. **Account:** Enter the first Account code for your BT
 - f. **Program:** Enter the first Program code for your BT
 - g. **Amount:** Enter the amount you wish to decrease or increase the FOAP by.
 - i. **Note:** The total sum of your decreases (-) and increases (+) **must** equal. If you are decreasing X number of accounts by \$300, you must increase X number of accounts by \$300.
 - h. **Debit/Credit:** Only use the + or – symbols. Do **NOT** use Debit or Credit. Debits and Credits are used only by the Business Office.
 - i. **Description:** Always start with “BT:” then enter a general description
 - j. **Budget Period:** Must always coincide with the month in the **Transaction Date** field above (1 for July, 2 for August, 3 for September, etc.)
 - k. Once entered, click either **Save** or **Add Accounting**. **Save** will add the sequence to the BT and close the popup window. **Add Accounting** will add the sequence to the BT and clear the popup window so that

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you can enter the next line. If you have more lines to enter, click **Add Accounting**. On your final line, click **Save**.

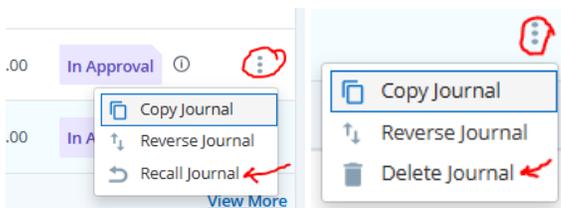
- I. Once your final line is entered and you've clicked **Save**, you will see your overall BT and each line/sequence you've entered. Review each line to ensure it is accurate. If you need to correct any lines, simply click anywhere on the line and the window will pop up. Make your edits and then click **Save**.
6. Click **Submit Journal** to submit the BT to your Division Office for review. Click **Save as draft** only if you wish to hold onto the BT to amend and submit at a later time.
7. After submitting or saving your BT, you will see the **My Journals** page that indicates any draft/saved BTs, pending BTs that are awaiting approval, and completed BTs that are posted in Banner. Please note the J-number and reference it on any Business Office forms that it may apply to.

My Journals Search Journal

Document	Date	Description	Total	Status
Draft Journals 0				
Pending Journals 7				
J2501713	01/30/2025	BT: TEST SUBMISSION	200.00	In Approval ⓘ ⋮
J2501698	01/28/2025	BT: BUDGET SETUP	6,210.00	In Approval ⓘ ⋮
View More				
Completed Journals				
J2501664	01/27/2025	BT: COVER FOOD	2,400.00	Completed ⋮
J2501662	01/27/2025	BT: COVER FIELD TRIP	10,000.00	Completed ⋮
View More				

Making Corrections to Budget Transfers

Need to fix a BT that you recently submitted? If the BT has not yet been fully approved, you can recall the BT, make any necessary corrections, and resubmit. To amend a BT, click ⋮ then **Recall Journal** to bring it back to your drafts. You may then click on the BT to edit it. If you need to delete a BT, recall the journal so that it is in your **Draft Journals** section, click ⋮ then click **Delete Journal**.





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Exhibit A: Initial Submission Window

The information you enter in this window acts as a “default” for every line you enter on the actual BT. It essentially pre-fills those fields for you so you don’t have to type it every time.

Create Journal ×

Transaction Date *

Redistribution

NSF Checking

Distribution Total

Deferred Edit

My Journal Defaults Section

Journal Type

× ▼

Bank Code

▼

Budget Period

× ▼

Comment

Public Comment ▲

Enter public comments for the journal

Private Comment ▲

CREATE



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Exhibit C: Finished Budget Transfer

Below is an example of a BT that is ready for submission. The FOAPs used below are for example purposes only. **Do not use the Org or Program codes in the example below.**

J2501713 Search Accounting

Transaction date : 01/30/2025 Total : 200.00 Status : Draft

Accounting Distribution 3

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Fund	Organization	Account	Program	NSF Override	Description
<input type="checkbox"/> 1	✔	SSBT	1	--	100.00	- Minus	103001	31100	4301	671000	<input type="checkbox"/>	BT: TEST SUBMISSION
<input type="checkbox"/> 2	✔	SSBT	1	--	50.00	+ Plus	103001	31100	5220	671000	<input type="checkbox"/>	BT: TEST SUBMISSION
<input type="checkbox"/> 3	✔	SSBT	1	--	50.00	+ Plus	103001	31100	5851	671000	<input type="checkbox"/>	BT: TEST SUBMISSION

Accounting total : 200.00 + Add accounting

Back Save as draft Submit Journal