University of Houston ⌁ Clear Lake

Planning and Budget

Originator/College/Division Business Admin.	1.	Obtain a document number from the departmental log for the Budget Journal.
	2.	Create the budget journal and budget pre-check it in PeopleSoft.
	3.	Electronically attach the required supporting documentation for the budget journal.
	4.	Select "Approve" and "Apply" on the Approval 2 tab to enter the budget journal into the workflow.
College/Division Business Admin.	5.	Monitor the budget journal worklist reviewing each budget journal along with its supporting documentation.
	6.	Select an Approval Action for the budget journal on the Approval 2 tab.
Provost (depending on the path selected)	7.	Review each budget journal on the worklist along with the supporting documentation.
	8.	Select an approval action for the budget journal on the Approval 2 tab.
Planning & Budget Office	9.	Review each budget journal on the worklist along with the supporting documentation.
	10.	Select an Approval Action for the budget journal on the Approval 2 tab.
	11.	Post the budget journal. If the budget journal fails to post and returns a status of "V", print the budget journal and resolve the amount-based error with the department.
	12.	Complete the accompanying journal entry form if the budget journal transfers funds between cost centers. Submit the Journal Entry to General Accounting for processing.