How to move an Expense

1. Run a Budget Detail report from your MyUT 'Report' section

Trans Date	Activity Date	Document Code	Rule Class	Transaction Description	Document Ref #	Transaction Amount
725001 - Purchasing Card (Clearing)						
08/02/22	08/02/22	S0359294	IPNI	BUFFER PUBLISH PRO YR		144.00
08/02/22	08/02/22	S0359295	IPNI	IMAGING CONCEPTS, LLC		244.01
08/02/22	08/02/22	S0359296	IPNI	HARMONS - DIXIE		15.81
08/02/22	08/02/22	S0359297	IPNI	AMZN MKTP US*1G86Z1EN1		12.95

2. Copy the line of the expense you would like to move and paste the line into an email addressed to business services (business_svs@utahtech.edu) The information needed for the move needs to include: description, document code, amount, current index, current account code, index where to move it, and new account if it needs to change, why it needs moved, and who authorized/requested it (budget admin/signer).
*The easiest way to communicate authorization to business services is to forward an email from one of the index signers create an email chain, see example below.

> **Hello,**
>
> **Please move the following transaction from VPA101 725001 to VPA315 750550.**
>
> **08/02/22 08/02/22 S0359297 IPNI AMZN MKTP US*1G86Z1EN1 12.95**
>
> **Reason for move: I was unable to allocate p-card purchases when I went on vacation. I have obtained authorization from Michael Lacourse see email below. Thanks, Sarah**

From: Michael Lacourse
Sent: Friday, September 16, 2022 8:33 AM
To: Sarah Shurtliff <sarah.shurtliff@utahtech.edu>
Subject: VPA315

> **Sarah,**
> **I think the amazon purchase for $12.95 needs to be moved to VPA315 can you look into this?**
> **Thanks, Michael**

3. Wait until the transaction has been moved and run another budget detail report to confirm the transaction has been moved out of the correct index & account and into the correct index & account. (Budget detail reports will need to be run for both indexes)

Trans Date	Activity Date	Document Code	Rule Class	Transaction Description	Document Ref #	Transaction Amount
08/02/22	08/02/22	S0359297	IPNI	AMZN MKTP US*1G86Z1EN1		12.95
08/02/22	08/02/22	S0359298	IPNI	AMZN MKTP US*A85GS0GF3		67.99
08/02/22	08/02/22	S0359299	IPNI	PRESTON S ROCKIN P SH		39.95
08/16/22	08/16/22	S0360477	IPNI	NEWEGG MARKETPLACE		64.60
08/16/22	08/16/22	S0360478	IPNI	WICHE		250.00
08/22/22	08/23/22	J0023599	JE16	NEWEGG MARKETPLACE S0360477	S0360477	-64.60
08/22/22	08/23/22	J0023599	JE16	WICHE S0360478	S0360478	-250.00
08/22/22	08/23/22	J0023599	JE16	AMZN MKTP US*A85GS0359298	S0359298	-67.99
08/22/22	08/23/22	J0023599	JE16	HARMONS-DIXIE S0359296	S0359296	-15.81
08/22/22	08/23/22	J0023599	JE16	PRESTON S ROCKIN P SH S0359299	S0359299	-39.95
08/22/22	08/23/22	J0023599	JE16	AMZN MKTP US*1G86Z1EN1 S0359297	S0359297	-12.95

**You can see that this was the correct transaction because the Document Code is the same as Document Ref #.