



# STEPS IN PREPARING BUDGET TRANSFERS

## To Login Adobe Sign:


1. Go to <https://www.smc.edu/administration/information-technology/support.php> and click on .
2. Enter your @smc.edu email address and click .
3. Login the same way you login your computer.



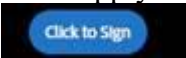
## To Create a Budget Transfer Form:

4. Click “**Start from Library**” .
5. Click “**Workflows**” on the left margin.
6. In the search box, type “Budget”.  
There are two budget transfer forms available

**Fiscal - Budget Transfer – No VP Approval** : Use this form when transferring within the same major object code, e.g. 4550 to 4560. No Vice President signature is required for this form

**Fiscal - Budget Transfer – VP Approval** : Use this form when transferring between different major object code, e.g. 4550 to 5890. Vice President signature is required for this form


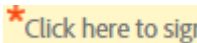



7. Click on the form you will use, then click . The screen will show where you put in where you want the form to be directed to. You will receive an email from Adobe Sign.
8. In the first box, **Preparer – OPTIONAL**, enter your email address. (If the preparer is the same as the manager approving the form, this line can be left blank).
9. In the second box, **Manager Email**, enter email address of the Manager approving the form.
10. If Vice President approval is needed, In the box Vice President Email, enter email address of Vice President approving the form.
11. In the box, **Accountant Email**, enter email address as follows
  - a. **Fund 01.0 Budget Transfer**  
**Accountant Email** : (Enter [budget@smc.edu](mailto:budget@smc.edu))  
**Fiscal Services Manager** : (Enter email of Director of Budget)
  - b. **Fund 01.3 Budget Transfer**  
**Accountant Email** : (Enter email address of the Accountant in charge of the Program)  
**Fiscal Services Manager** : (Enter email of Accounting Manager)

12. For Document Name, enter 5-digit location number then date in the parenthesis (e.g. **00003 FY 23-24** for location 3 in FY 2023-24).
13. Click 
14. Fill in the budget transfer form with transfer from and to account numbers, amounts and reason. All fields marked with a red asterisk symbol must be filled.
15. Scroll to the bottom of the form and click on . You will be asked to sign then click on “Apply”. If you have signature in adobe sign, the signature will show.
16. Click on  at the bottom of the screen. When all signatures are completed, you will receive an email from Adobe Sign. Approvers will get email from FCCC-Santa Monica College.

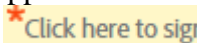

### **To Approve the Budget Transfer Form:**



You will be receiving an email to approve the document. There are two ways to do this.

#### **Option 1:**


17. In the email, click on the box  and the budget transfer form will open.
18. Scroll to the bottom of the form and click on . You will be asked to sign then click on “Apply”. If you have signature in adobe sign, the signature will show.
19. To reject the budget form, click on  which appears on the left side of the screen and click on “Decline to sign”. You will be asked to indicate the reason for declining and the preparer and previous approver will be receive an email informing them the form was declined.
20. Click on  at the bottom of the screen.
21. You can also have another person review and approve the form (e.g. it was missent to you), click on  which appears on the left side of the screen and click on “Delegate signing to Others”.

#### **Option 2:**

22. Log in Adobe Sign (See Step 1, 2, 3 above).
23. Click on Manage.
24. On the left side margin under “Your Agreements”, click on “Waiting for You”.
25. Go to the document you want to review and approve and click on Open.
26. Scroll to the bottom of the form and click on . You will be asked to sign or signature will show if you already have a signature in adobe sign.
27. To reject the budget form, click on  which appears on the left side of the screen and click on “Decline to sign”. You will be asked to indicate the reason for declining and the preparer and previous approver will be receive an email informing them the form was declined.

28. Click on  at the bottom of the screen.
29. You can also have another person review and approve the form (e.g. it was missent to you), click on  which appears on the left side of the screen and click on “Delegate signing to Others”.

### **To View Completed Documents**

30. Log in Adobe Sign (See Step 1, 2, 3 above).
31. Click on Manage
32. On the left side margin under “Your Agreements”, click on “Completed” and a list of all completed form will show.
33. Choose the document you want to view You can either Open or Download a pdf copy of the document  .