BUD-28 Carryforward Funds Available (Appropriations)

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Carryforward Funds Available (Appropriations) in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of carrying forward funds available, which is the process of moving the appropriations budget amounts for CI budget codes from one budget year to another.

Carryforward Funds Available (Appropriations)

To Carryforward Funds available, please follow the steps below. There are 9 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

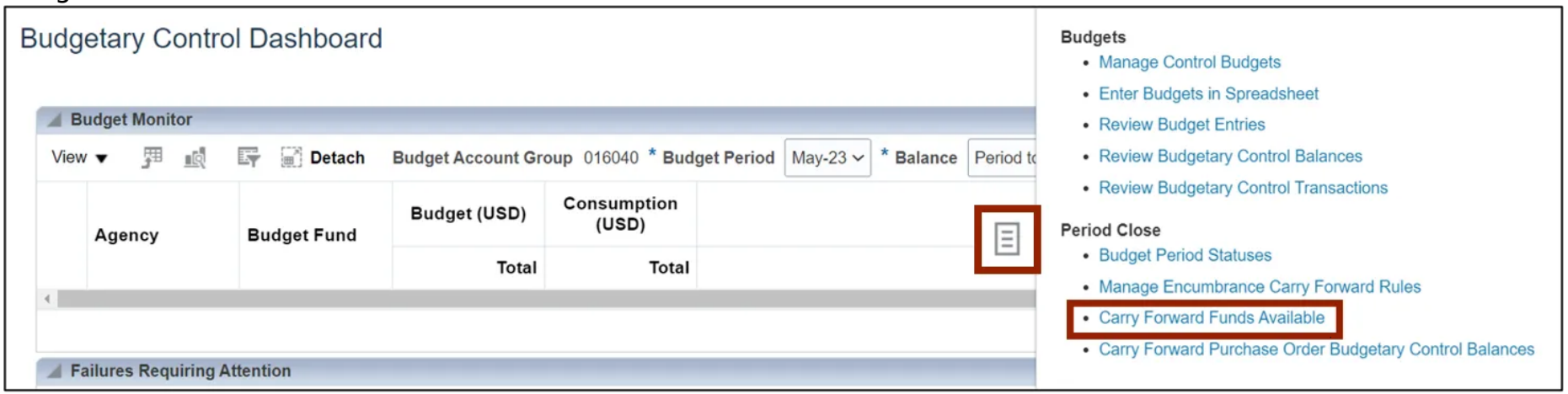
Step 2. On the **Home** page, click the **Budgetary Control** tab and click the **Budgetary Control** app.

Image



Step 3. Click the **Tasks** icon and under **Period Close**, select **Carry Forward Funds Available**.

Image

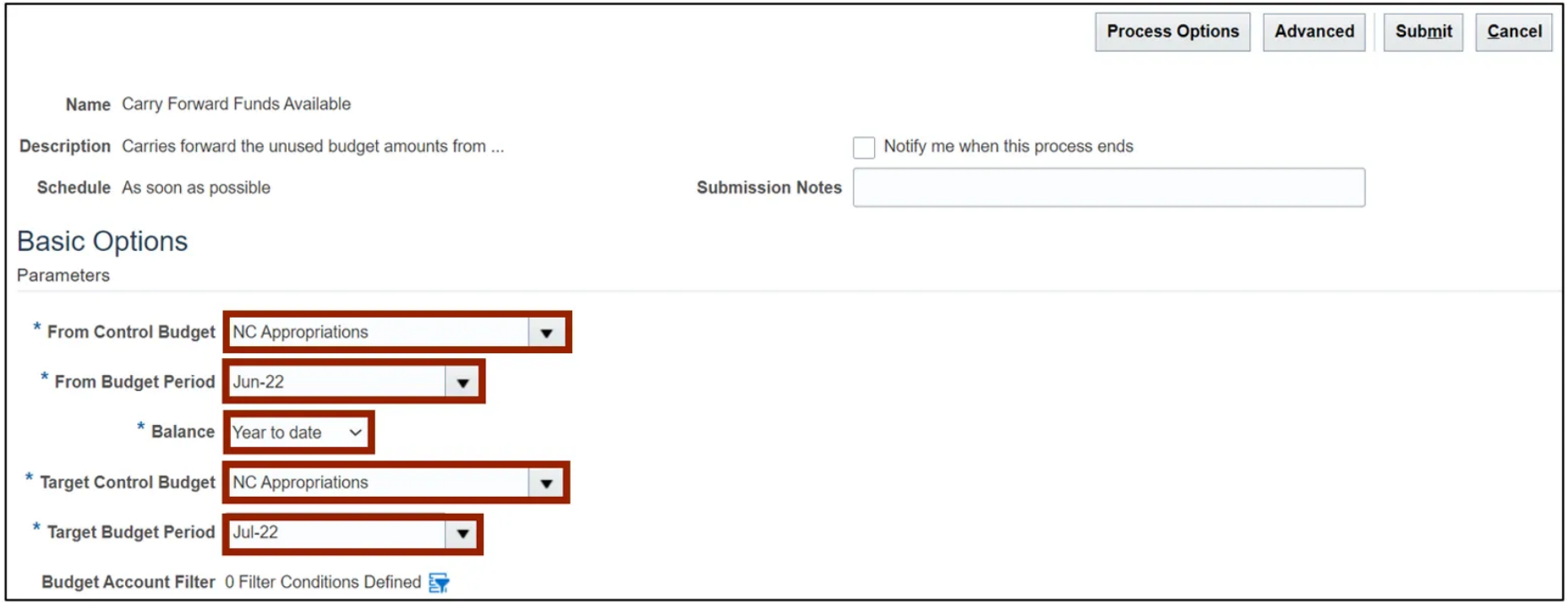


Step 4. Enter or select the required information on the ***From Control Budget, *From Budget Period, Balance, *Target Control Budget,** and ***Target Budget Period** fields from the respective drop-down choice lists.

In this example, we choose:

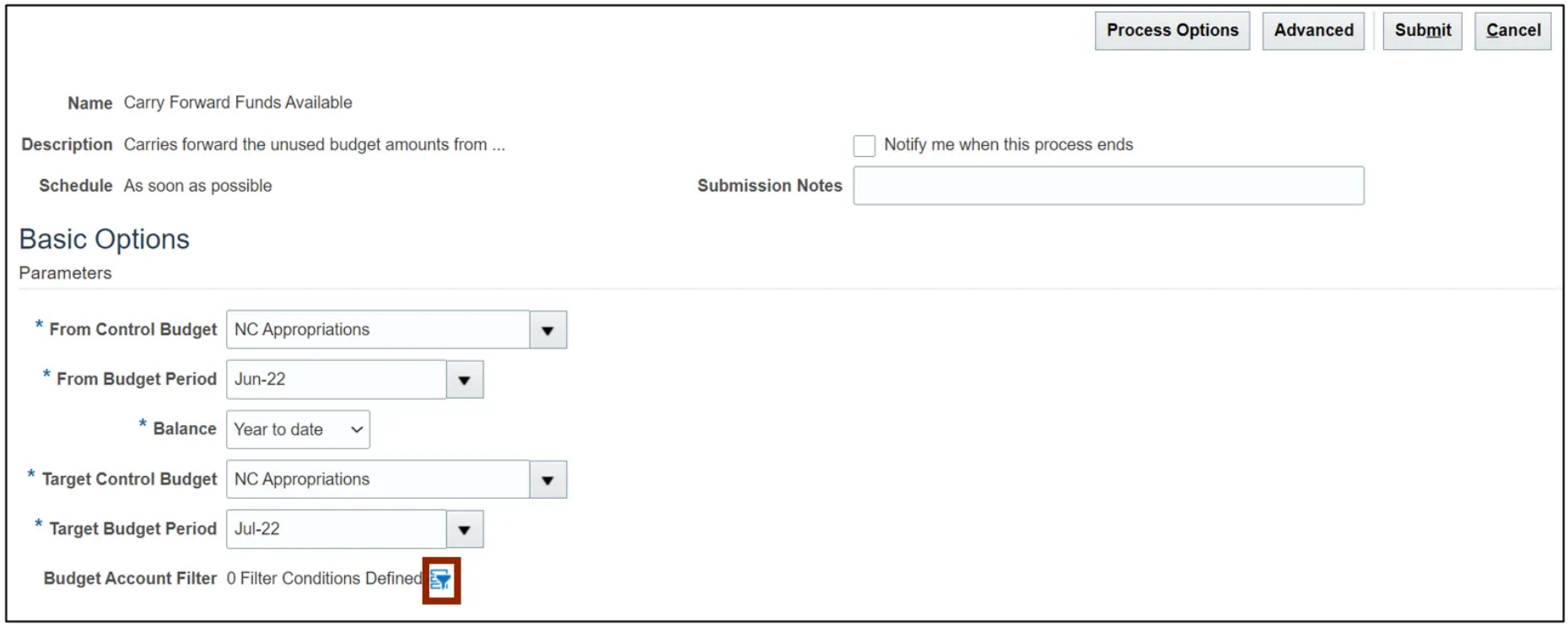
- From Control Budget: NC Appropriations
- From Budget Period: Jun-22
- Balance: Year to date
- Target Control Budget: NC Appropriations
- Target Budget Period: Jul-22

Image



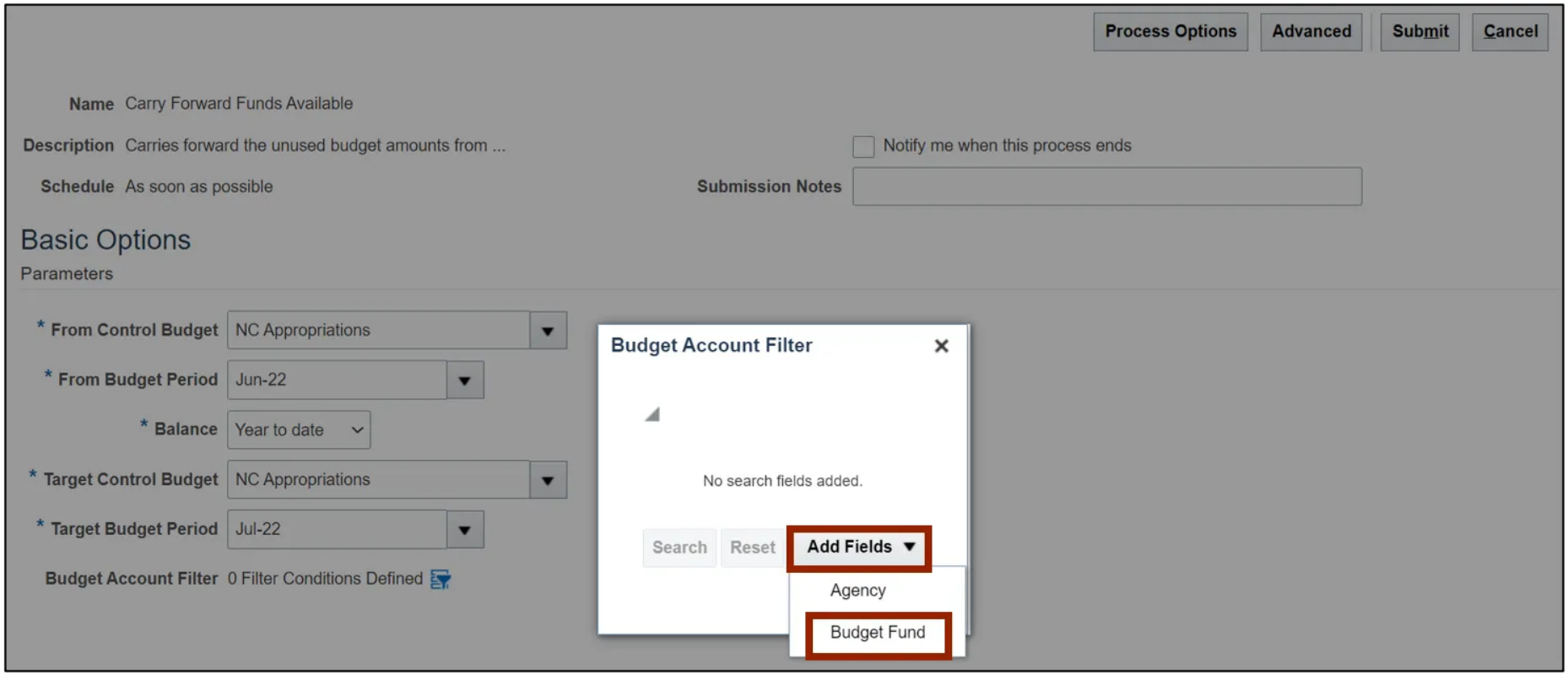
Step 5. Click the **Filter** icon to add a **Budget Account Filter**.

Image



Step 6. Click the **Add Fields** drop-down choice list and select **Budget Fund**.

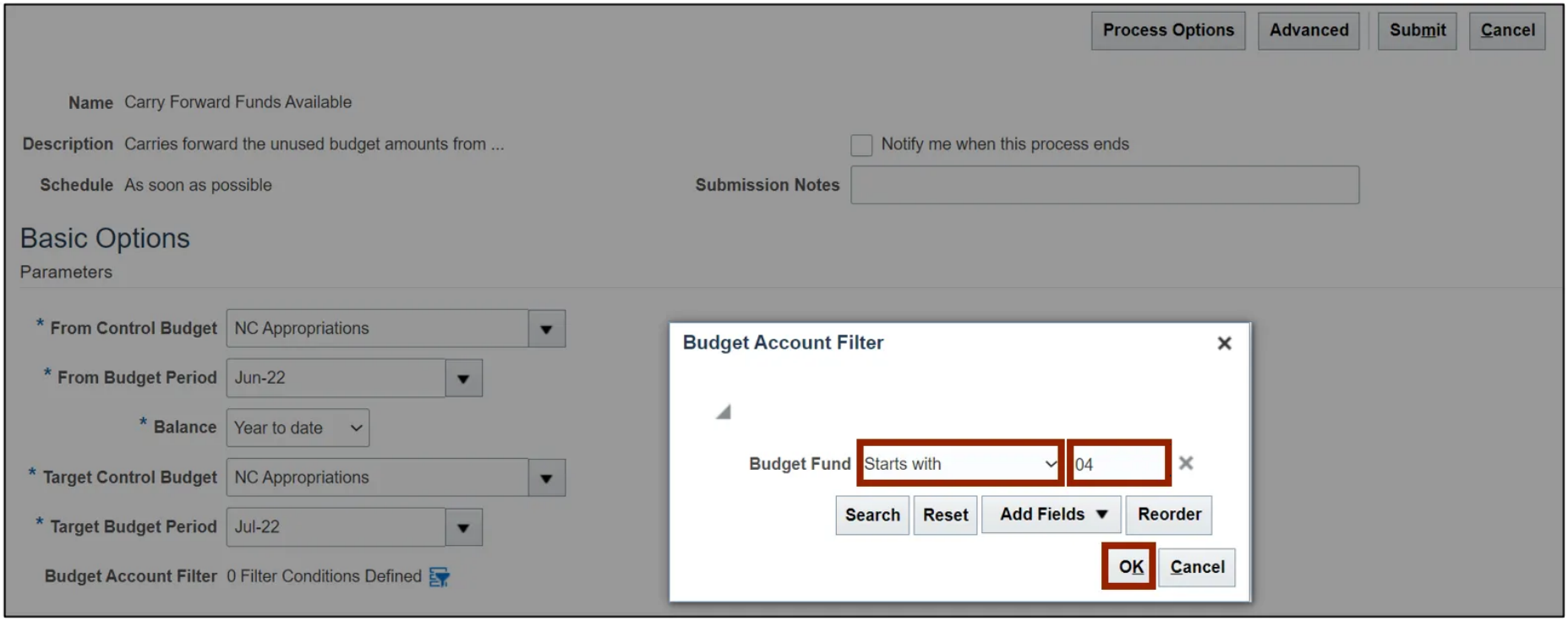
Image



Step 7. Enter the required filter on the **Budget Fund** field and click the **OK** button.

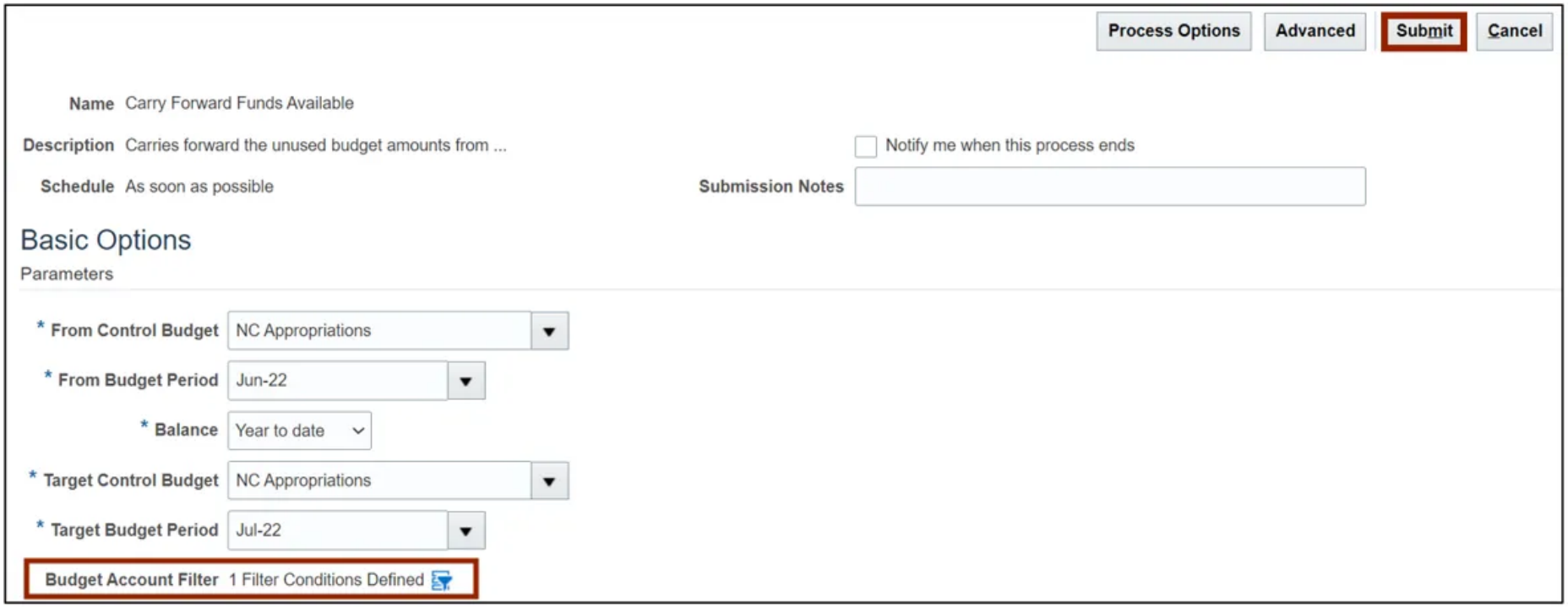
In this example, we choose **Budget Fund** as **Starts with 04**.

Image



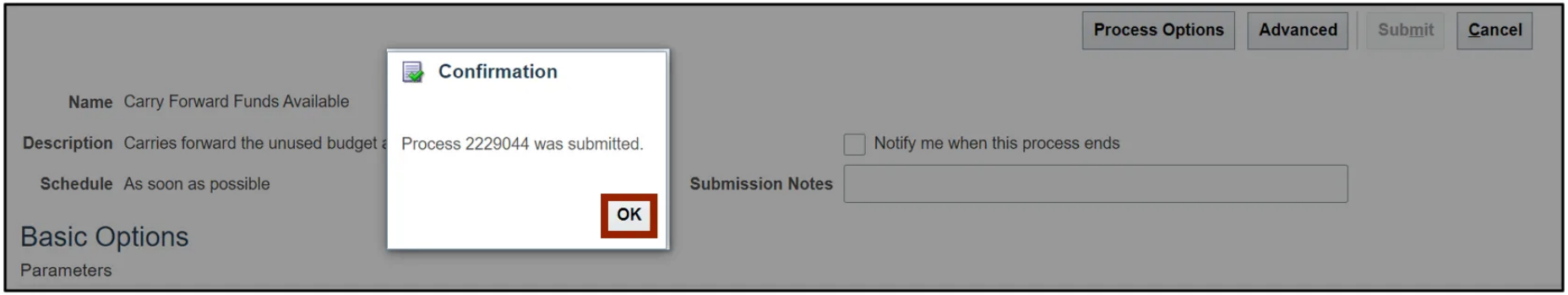
Step 8. Click the **Submit** button.

Image



Step 9. The *Confirmation* pop-up appears. Click the **OK** button.

Image



Note: You can view the review budgetary control balances screen to verify the carryforward amounts.

Wrap-Up

Carryforward funds available for unused budget appropriations amounts for CI budget codes from one budget year to another by using the steps above.

Additional Resources

- Web-Based Training (WBT)
  - BU001: Budget Inquiry

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