

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.

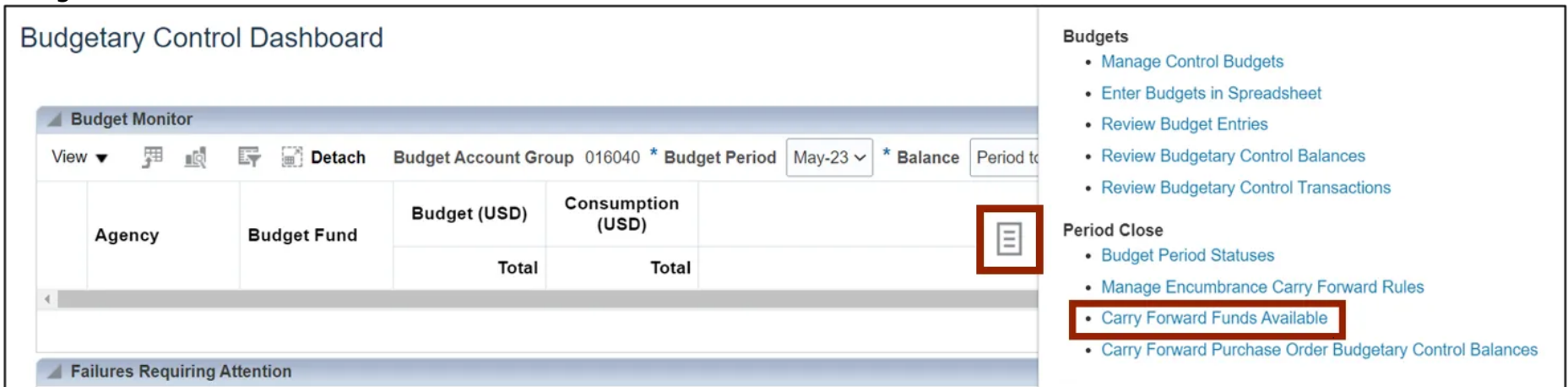
Step 2. On the **Home** page, click the **Budgetary Control** tab and click the **Budgetary Control** app.

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

Process Options

Advanced

Submit

Cancel

Name

Carry Forward Funds Available

Description

Carries forward the unused budget amounts from ...

Schedule

As soon as possible

Submission Notes

☐ Notify me when this process ends

Basic Options

Parameters

* From Control Budget

NC Appropriations

* From Budget Period

Jun-22

* Balance

Year to date

* Target Control Budget

NC Appropriations

* Target Budget Period

Jul-22

Budget Account Filter

0 Filter Conditions Defined

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

Image

Process Options

Advanced

Submit

Cancel

Name

Carry Forward Funds Available

Description

Carries forward the unused budget amounts from ...

Schedule

As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

* From Control Budget

NC Appropriations

▼

* From Budget Period

Jun-22

▼

* Balance

Year to date

▼

* Target Control Budget

NC Appropriations

▼

* Target Budget Period

Jul-22

▼

Budget Account Filter

0 Filter Conditions Defined



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

Image

Process OptionsAdvancedSubmitCancel

NameCarry Forward Funds Available

DescriptionCarries forward the unused budget amounts from ...

☐ Notify me when this process ends

ScheduleAs soon as possibleSubmission Notes

Basic OptionsParameters

* From Control BudgetNC Appropriations

* From Budget PeriodJun-22

* BalanceYear to date

* Target Control BudgetNC Appropriations

* Target Budget PeriodJul-22

Budget Account Filter0 Filter Conditions Defined

Budget Account Filter

No search fields added.

SearchResetAdd Fields

Agency

Budget Fund

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

Process OptionsAdvancedSubmitCancel

NameCarry Forward Funds Available

DescriptionCarries forward the unused budget amounts from ...

☐ Notify me when this process ends

ScheduleAs soon as possible

Submission Notes

Basic OptionsParameters

* From Control BudgetNC Appropriations

* From Budget PeriodJun-22

* BalanceYear to date

* Target Control BudgetNC Appropriations

* Target Budget PeriodJul-22

Budget Account Filter0 Filter Conditions Defined

Budget Account Filter

Budget FundStarts with04

SearchResetAdd FieldsReorder

OKCancel

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

Image

Process Options
Advanced
Submit
Cancel

Name Carry Forward Funds Available

Description Carries forward the unused budget amounts from ...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

* **From Control Budget** NC Appropriations ▼

* **From Budget Period** Jun-22 ▼

* **Balance** Year to date ▼

* **Target Control Budget** NC Appropriations ▼

* **Target Budget Period** Jul-22 ▼

Budget Account Filter 1 Filter Conditions Defined

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

Image

Process Options
Advanced
Submit
Cancel

Name Carry Forward Funds Available

Description Carries forward the unused budget amounts from ...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

Confirmation

Process 2229044 was submitted.

OK

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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