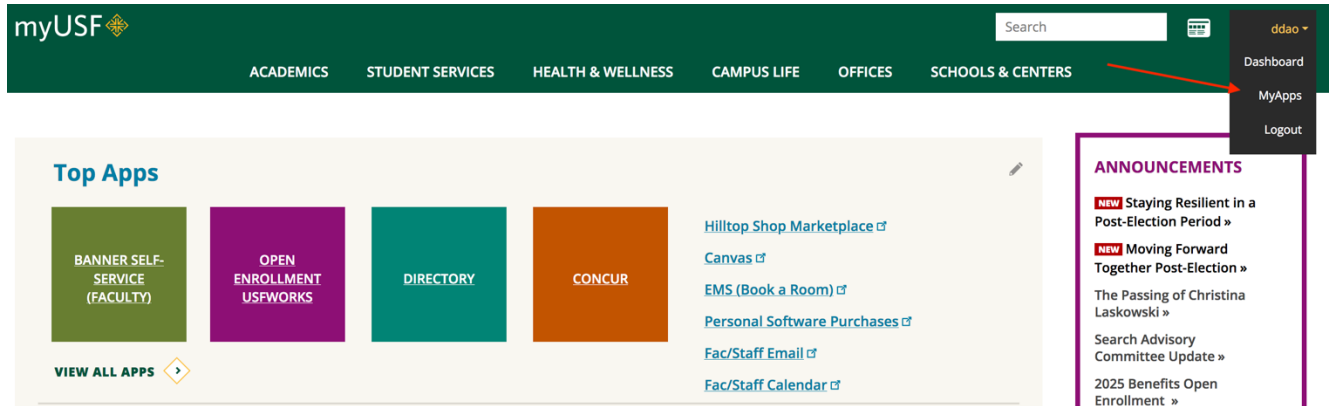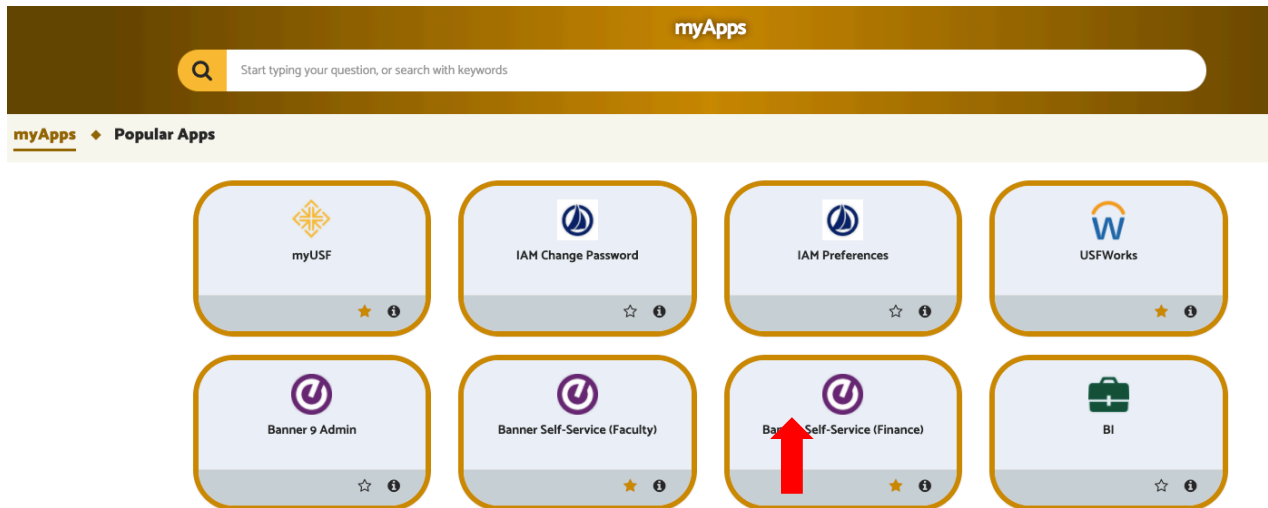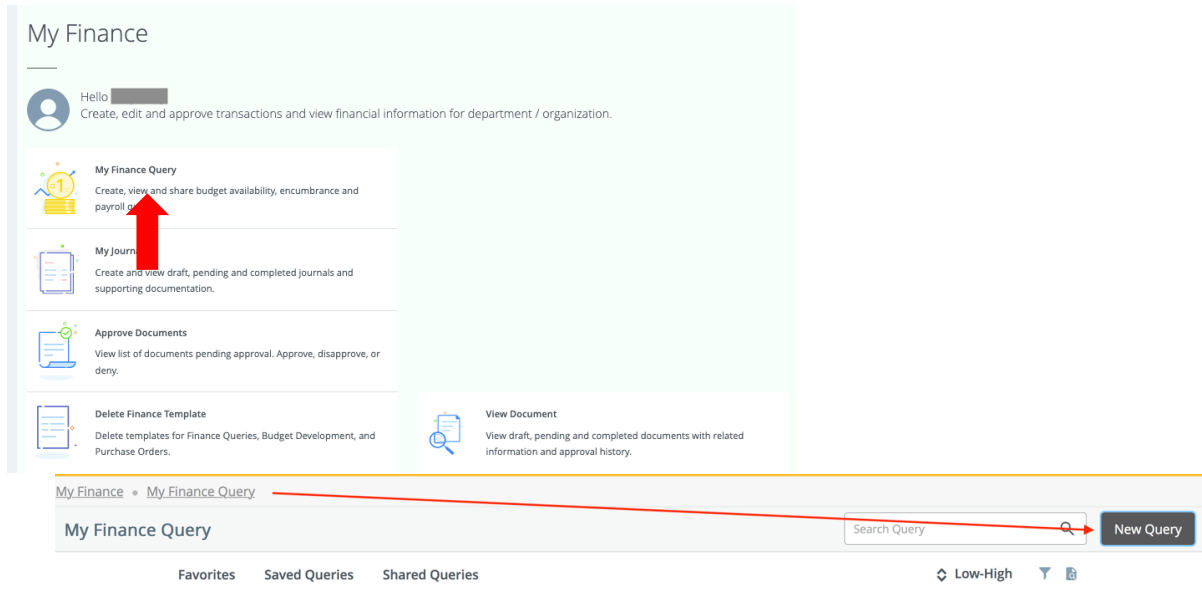CAS - Accessing Self-Service Banner Finance

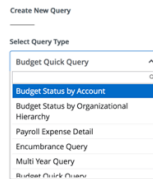Log into **myUSF** and click on **MyApps** under your user name.

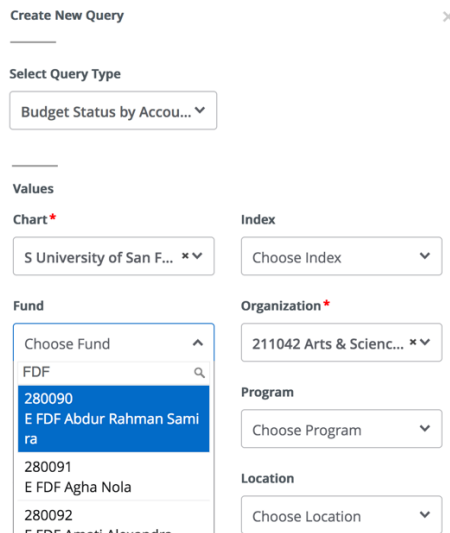Then click on **Banner Self Service (Finance)**.

Select **My Finance Query** and click on **New Query**.

Select **Budget Status by Account** from the drop-down menu.

Values – Type in your FDF# or first/last name under **Fund** and 211042 under **Organization**, while leaving the **Program** field **blank** to capture all activities. Clear the **Program** field if the default value 1200-Research pops up.

Fiscal Year – Enter current fiscal year (2023), and fiscal period **14** for year-to-date activities.

Check the following boxes.

Submit!

The bottom right corner is the current balance after the expenses are posted.

Save Query as Template

You can save the query as a template to reuse in the future. Click the "Save-as" icon to open a pop-up window.