

FIN How-to: What Makes a Good Long Description ^[1]

The Long Description provides an explanation for a journal entry both to your approver, now, and to an auditor, down the road.

Watch the Video

Read the procedures

One of the required fields in a Journal Entry is the Long Description. The Long Description documents the business purpose of the JE. It provides an explanation of the JE for your approver and to an auditor.

So what makes a good Long Description?

A clear and concise explanation of why you created the journal entry -- and what it's meant to do.

As a general rule:

- If you're making or receiving a payment, explain what the payment is for.
- If you're transferring cash, explain where the transfer is coming from and going to and why the transfer is occurring.
- If you're moving an expense to a sponsored project, explain why the expense is appropriate to that award.
- If you're correcting an error, explain how the error occurred. And, if more than 90 days have passed, why it took so long to make the correction.

For example:

Don't create a Long Description that simply says:
"To transfer expenses."

Instead, say something like:

"To transfer operating expenses from XYZ sponsored project (ST 63012345) that is over budget due to supply costs being greater than planned. Transferring expenses to an allowable unrestricted department funding source (ST 61012345)."

A few tips:

- The Long Description field is up to 254 characters. You can use abbreviations when necessary, but remember, your description needs to be understandable to others.
- You can change the Long Description at any time before the JE is posted. Changing this

field will remove a submitted JE from workflow and require you to resubmit it.

- If you want to explain specific lines of the JE -- including any unusual debits or credits -- you can use the Journal Line Description fields on the Lines screen.
- And remember: Your attachments should provide supporting documentation for your JE actions!

Have a question or feedback?

Questions & Feedback ^[2]

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