To ensure timely processing please review the list below prior to sending OSP your Budget Transfer Request:

☐ Is the grant still active?
  ☐ If not, have you requested a no-cost extension? (please attach email request)

Salary:

☐ Does the transfer involve salary from different accounts with different fringe rates?
  ☐ Yes?
    ☐ Is a fringe benefit transfer included?
    ☐ Did you use the correct fringe rate?

☐ Is prior approval needed from Sponsor? (Example: change in scope, effort reduction >25%)
☐ Justification for transfer included? (Example: who are you hiring and why do you need to hire them)
☐ Verify budget funds available to transfer
☐ Does this transfer reflect all future salary needs for funds in this budget category based on a projection of anticipated expenses through the end of the grant period, in an effort to reduce volume of budget transfers?

Non-Salary Expenses:

☐ Are you are moving funds in or out of a line that will impact F&A? (Examples: Equipment, Participant Support, Subs (64430), Tuition Remission)
  ☐ Yes?
    ☐ Is a F&A transfer included?
    ☐ Did you use the correct F&A Rate?

☐ Is prior approval needed from Sponsor? (Examples might include: Equipment or Subs not in the original proposal, foreign travel, change in scope)
☐ Justification for transfer included? (Example: Travel - where/who is going/why)
☐ Verify budget funds available to transfer
☐ Does this transfer reflect all future needs for funds in this budget category based on a projection of anticipated expenses through the end of the grant period, in an effort to reduce volume of budget transfers?

7/19/2012