

GUIDELINES ON ATTACHMENTS FOR BUDGET TRANSFERS: FUND 120 & 500

PURPOSE

This document intends to assist users identify the appropriate supporting attachment(s) to include for budget transfers for Fund 120 & 500.

Account Adjusting	Reason	Attachment	Remember
Faculty salary or key personnel salary accounts	Is effort changing? Is effort changing by more than 25%? Why are you requesting this change?		Also adjust fringe
Sub Accounts (64420/64430)	Did you receive approval to add a sub to an award?	1. Sponsor approval or OSP pre-award approval (email) 2. executed sub agreement	Also adjust F&A
Sub Accounts (64420/64430)	Did you receive approval to re-budget funds out of the sub accounts (decided not to sub out the work, sub final invoice came in under-budget, etc...)	1. Sponsor approval or OSP pre-award approval (email) 2. Justification/reason	Also adjust F&A
Tuition/Aid	Why are you requesting a re-budget?		Also adjust F&A
Participant Accounts			Also adjust F&A
Equipment	Did you decide not to purchase a piece of equipment?	1. Sponsor approval or OSP pre-award approval (email) 2. Justification/reason	Also adjust F&A
Equipment	Did you purchase all of the equipment, but it cost less than originally anticipated?	1. Proposed equipment budget detail 2. List of equipment already purchased on the award with voucher #'s (should clearly show all proposed items were purchased) 3. Justification/reason	Also adjust F&A
Equipment	Did you decide to purchase a piece of equipment not originally budgeted?	1. Justification for why this equipment is now needed 2. Quote	Also adjust F&A

Note: If Sponsor approval is needed or you are unsure if Sponsor approval is needed please contact OSP ***prior*** to submitting a budget transfer. Any necessary Sponsor or OSP approvals should take place ***prior*** to the budget transfer being entered in the system.