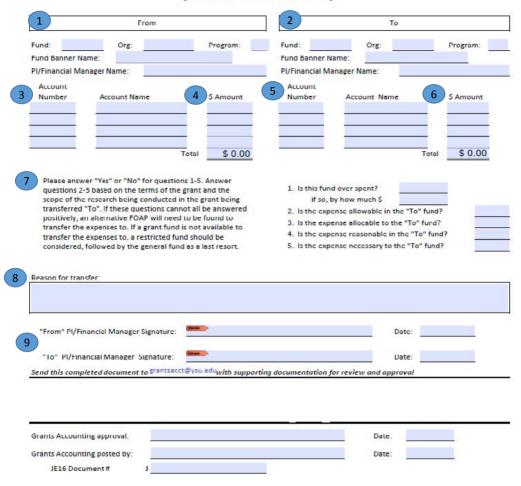
Instructions

Grant Expense Transfer Form (between funds)



- Enter the Fund, Organization (Org), Program, Fund Banner Name, and Principal Investigator (PI)/Financial Manager's name for the grant that you are processing a transfer From. This information can be found on the Grant Profile Sheet in the "New Grant" email you received from Theresa Orwell regarding the initial setup of the grant.
- Enter the Fund, Organization (Org), Program, Fund Banner Name, and Principal Investigator (PI)/Financial Manager's name for the grant that you are processing a transfer To.
- 3. Enter the account number and the account name that you are transferring expense From.
- 4. Enter the amount. If your transfer contains multiple accounts in the "From" or "To" column, please enter the amounts on the respective lines. (See example 2).
- 5. Enter the account number and the account name that you are transferring expense To.
- Enter the amount. If your transfer contains multiple accounts in the "From" or "To" column, please enter the amounts on the respective lines. (See example 2).
- 7. Please answer the following list of questions. Your answers should be based on the terms of your grant and the scope of the research being conducted. If questions 2-5 cannot ALL be answered positively, an alternative FOAP will be needed to transfer the expense to. If a grant fund is not available to transfer the expense to, a restricted fund should be considered. If transferring an expense to a non-grant fund, questions 7:3 and 7:5 will be "No".
- 8. Please explain the reason for your transfer.
- 9. The PI/Financial manager for the "From" fund and the "To" fund must both sign and date.
- Attach supporting documentation and send to Grants Accounting for their review, approval, and processing.

Contact Grants Accounting for any questions you may have regarding the above form/instructions.

Example 1 - "From" & "To" Account

Grant Expense Transfer Form (between funds)

Fund:	211123	Org:	141123	Progr	ram: 22	Fund:	211125	Org:	141123	Program:	22
Fund Banner Name: YSU Grant Transfer Example Fund Banner Name: Penguin Grant											
PI/Financial Manager Name: G. Accounting PI/Financial Manager Name: P. Penguin											
		From :						To):		
Acco							Account				
701110	Number Account Name 01110 Instructional Supplies				\$ Amount Number \$500.00 701110			Account Name Instructional Supplies			
701110		Instructiona	Топрриез		ψ300.00		701110		siruciionai ou	риез	
				Total	\$500.00						
1. Is this fund over spent? If so, by how much \$ If these questions 2-5 based on the terms of the grant and the scope of the research being conducted in the grant being transferred "To". If these questions cannot all be answered positively, an alternative FOAP will need to be found to transfer the expenses to. If a grant fund is not available to transfer the expenses to, a restricted fund should be considered, followed by the general fund as a last resort. Barnes & Noble invoice #105 was incorrectly charged to grant 211123. Expense is for grant 211125. Please see attached invoice and email correspondence.											
From	PI/Financia	al Manager S	ignature:	TO TOO					Date:		
To PI/Financial Manager Signature:									Date:		
Send thi	s complete	d document	to grantsacct	@ysu.edu v	vith suppo	rting doc	cumentation f	or review	and approva	ı	
Grants	Accounting	approval:						Date	:		
Grants Accounting posted by:							Date	2:			
JE	16 Docume	nt#	J								

Example 2 - Multiple "From" & "To" Accounts

Grant Expense Transfer Form (between funds)

Fund:	211123	Org:	141123	Progr	ram: 11	Fund:	241234	Org:	141123	Program:	11
Fund Bar	nner Name	e: YSU	Grant Transf	er Example	;	Fund B	anner Nam	e: YSU	Penguin Fund	d	
PI/Financial Manager Name: G. Accounting						PI/Fina	ncial Mana	ger Name:	P. Pengu	uin	
		From :							То:		
Accou Numb		Account Na	ame		\$ Amount		Accour Numbe		Account Name	e	
701110		Instructiona	l Supplies		\$500.00						
					\$250.00		701105	(Office Supplies	S	
					\$250.00		701110	I	Instructional St	upplies	
				Total	\$500.00						
if 2. Is the 3. Is the 4. Is the 5. Is the Reason f Fund 2	e expense e e expense e e expense e for transfe 211123 is 41234. S	w much \$ allowable in allocable to reasonable i necessary to r: s overspen	ed invoice a	d? und? nd? purchase		No No No No tional s	Answer questions 2-5 based on the terms of the grant and the scope of the research being conducted in the grant being transferred "To". If these questions cannot all be answered positive an alternative FOAP will need to be found to transfer the expenses to. If a grant fund is not available to transfer the expenses to, a restricter fund should be considered, followed by the general fund as a last resort. Il supplies. Please transfer the expense to nice. Date:				
To PI/Financial Manager Signature:									Date:		
Send this	complete	d document	to grantsacc	t@ysu.edu	with suppor	ting do	umentatio	n for revie	w and approv	val	
											_
Grants A	Accounting	approval:						Dat	te:		
Grants A	Accounting	posted by:						Da	ite:		
IF1	16 Docume	ant #									