



## Hybrid Budget Transfer Request

Budget Office - budgetoffice@slcc.edu

Mailstop: BGT

Phone: 801-957-4243

Date: \*

8/23/2021

Fiscal Year: \*

YYYY

Division: \*



### Instructions

No.	Index Code	Fund	Account	\$ Amount	OT	P
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>				

I verify that the transfer(s) above are within the same Fund(s).

REASON FOR REQUESTED TRANSFER: \*

Hoa Nguyen

8/23/2021

Prepared By: \*

Date: \*

APPROVER USERNAMES: [How to find an approver username](#)

- Grant related transfers: Require PI, BCM (if different than PI) and Asst. Controller approvals
- All other transfers: Require Vice President/Provost/President approval only if the transfer is full-time salary related or moving \$25,000+ **FROM** a single source.

*At least one username is required.*

Principal Investigator (for grants only)

Budget Center Manager \*\*\*

Asst. Controller Grants & Restricted Programs

Second Level Supervisor

Vice President/Provost/President \*\*\*

\*\*\* If the BCM is also the VP/Provost/President, ONLY enter Approver Username in the VP/Provost/President field.

## Retrieve Hybrid Budget Transfer Request Instructions

*Hybrid budget transfer form is to request temporary and/or permanent budget transfers .*

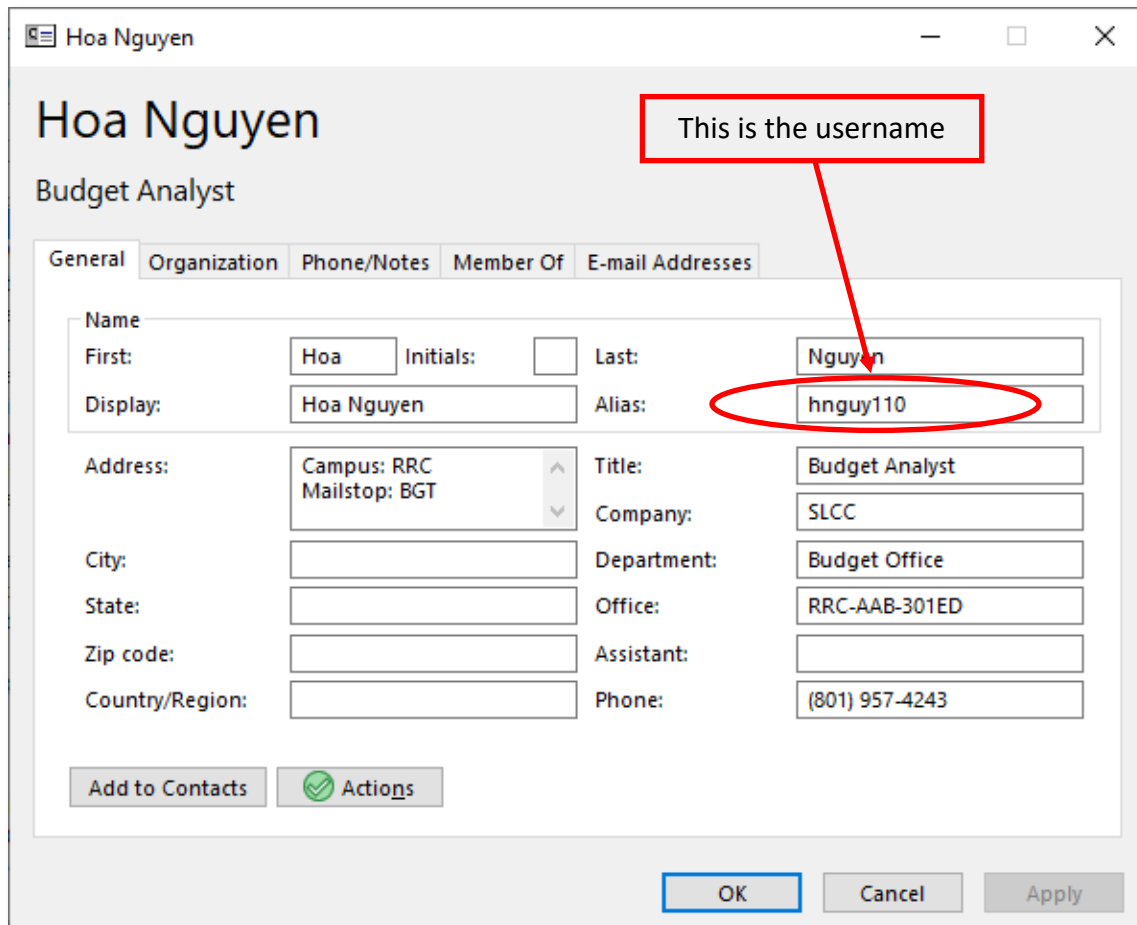
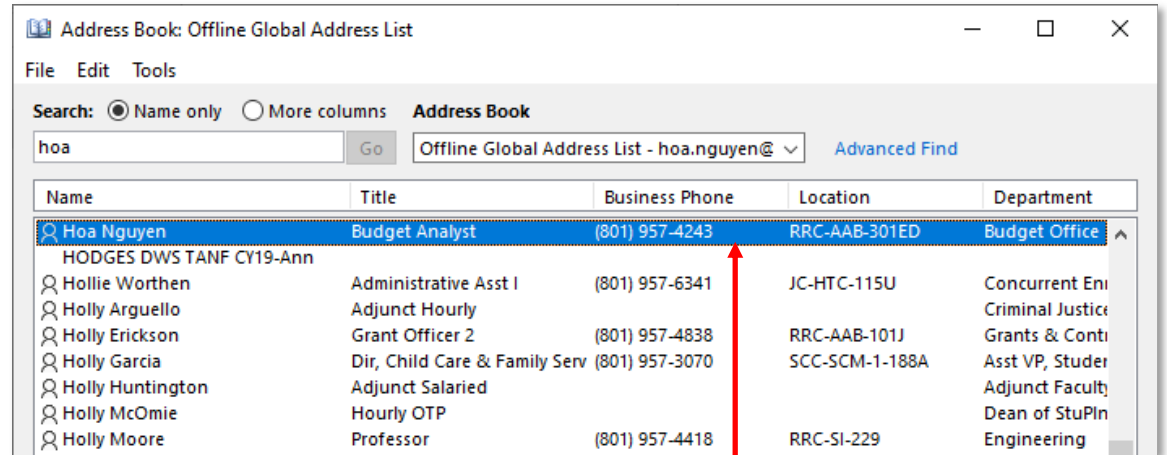
1. Fiscal Year: Enter the fiscal year the transfer must be posted in.
2. Division: Select your Division from the drop down list.

*If you are filling out the form for another department, make sure to select the Division of the Cabinet Member who will have final approval on the transfer.*

3. No. (optional): If you have multiple transfers for varying reasons on the same form, use this box to assign a reference number, as needed, to detail reasons for each line item. See example on last page. Otherwise, just leave it blank.
4. Index Code: Enter in all caps if it is an alpha index.
5. Fund: Auto-populated based on the index code entered.
6. Account: Select an account from the drop down list.
7. Amount: Enter negative dollar amounts for “transfer from” and positive dollar amounts for “transfer to”.
8. OT/P: Check “OT” for One-time or “P” for Permanent transfers. Either “OT” or “P” must be checked on each row .
9. Plus/Minus buttons: Click the Plus button to add a line. Click the Minus button to delete a line.
10. I verify that the transfer(s) are within the same Fund(s): Make sure your transfers are within the same fund and check this box before submitting.
11. Reason for the requested transfer: Provide clear and detailed reason for the requested transfer. If there are multiple transfers for varying reasons, reference the number input in the “No.’ field (see example on the last page.)
12. Approver username(s): This form requires at least 1 (and up to 5) signatures depending on the type of transfer and the account(s) and amount(s) entered.
  - Grant related transfers: Require Principle Investigator (PI), BCM (if different than PI) and Asst. Controller approvals.
  - All other transfers: Require Vice President/Provost/President approval only if the transfer is full-time salary related or moving \$25,000+ **FROM** a single source.
  - Follow instructions on the next page to get approver usernames.
  - Enter approver usernames in the appropriate fields. **If the Budget Center Manger (BCM) is also the VP/Provost/President, leave the BCM box blank and only enter the username in the VP/Provost/President box.**
  - Make sure to enter at least one approver username.
13. Attachments: Attached documents can only be in PDF or image formats.
14. Form tracking: After submitting a form, its status can be tracked using the History button at the bottom of the form, under the Activity tab.

## How to find an employee's username

1. Go to the Address Book in Outlook
2. Search for the employee, then double click on the name
3. A new window will pop up. The username is in the Alias box.



Double click on the person's name



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Finance and Administrati ▼

### Instructions

No.	Index Code	Fund	Account	\$ Amount	OT	P
1	BBPNTR	10000	62000 - Hourly <span>↑</span>	-10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	BBPNTR	10000	94000 - Equipm <span>▼</span>	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	BBCARP	10000	62000 - Hourly <span>↑</span>	-7700	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	BBPLUM	10000	94000 - Equipm <span>▼</span>	7700	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	BBCARP	10000	70000 - Current <span>▼</span>	-500	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	BBCARP	10000	90100 - Out-of- <span>£</span> <span>▼</span>	500	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		+	-			

I verify that the transfer(s) above are within the same Fund(s).

### REASON FOR REQUESTED TRANSFER: \*

1. Req 123456789 - Van for Painters
2. Seesnake with Battery
3. Arrowhead Breadker for Skid Steer

Hoa Nguyen

6/23/2021

Prepared By: \*

Date: \*

### APPROVER USERNAMES: [How to find an approver username](#)

- Grant related transfers: Require PI, BCM (if different than PI) and Asst. Controller approvals
- All other transfers: Require Vice President/Provost/President approval only if the transfer is full-time salary related or moving \$25,000+ **FROM** a single source.

At least one username is required.

baskerlu

Principal Investigator (for grants only)

Budget Center Manager \*\*\*

Asst. Controller Grants & Restricted Programs

Second Level Supervisor

jwest113

Vice President/Provost/President \*\*\*

\*\*\* If the BCM is also the VP/Provost/President, ONLY enter Approver Username in the VP/Provost/President field.