



Temporary Budget Transfer Request

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Date: * Fiscal Year: * Division: *

Do not use this form, use the Hybrid Transfer Request if the BCM who will approve this transfer is also the VP/Provost/President, or the indexes are grants (20000 - 29999), or one or more of the approvers are Acting or Interim.

Instructions

TRANSFER FROM:

| Index Code | Fund | Account | \$ Amount |
|---|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="button" value="+"/> <input type="button" value="-"/> | | | |

TRANSFER TO:

| Index Code | Fund | Account | \$ Amount |
|---|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="button" value="+"/> <input type="button" value="-"/> | | | |

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

REASON FOR REQUESTED TRANSFER: *

Prepared By: * Date: *

Retrieve Temporary Budget Transfer Request Instructions

Temporary budget transfer form is to request budget transfers that will apply to the current fiscal year only and will not carry over to subsequent fiscal years.

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. Index Code: Enter in all caps if it is an alpha index.

If the BCM who will approve this transfer is also the VP/Provost/President, please use the Hybrid Budget Transfer Request.

4. Fund: Auto-populated based on the index code entered.
5. Account: Select an account from the drop down list.
6. Amount: Enter positive dollar amounts with 2 decimal places.
7. Plus/Minus buttons: Click the Plus button to add a line. Click the Minus button to delete a line.
8. 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.
9. Reason for the requested transfer: Provide clear and detailed reasons for the requested transfer.
10. Attachments: Attached documents can only be in PDF or image formats.
11. 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.

Once the form is submitted, it will automatically be routed to the appropriate approver(s) based on the indexes, accounts, and amounts entered.

Do not use this form, use the Hybrid Transfer Request if:

- The BCM who will approve this transfer is also the VP/Provost/President.
- The indexes are grants (20000 - 29999).
- One or more of the approvers are Acting or Interim.