

# Budget Change Request: Instructions

## About the Form:

A Budget Change Request (also known as a “Budget Transfer Request”) is filled out when funding is needed in a budget other than where it was originally allocated. For example, if a department manager decides it is necessary to add a telephone line to his or her office space and a budget has not been set up for this activity, he or she would complete this form, indicating which budget to transfer the funds from and to.

This form allows one to transfer temporary or permanent funds from one budget department or area to another during an academic year.

## Instructions for Completing the Form:

*(Blue numbers correspond to the sample form below.)*

1. Originator: usually the primary budget manager
2. Budget year: current academic year (i.e. 2003-2004)
3. Telephone of originator
4. Today's date
5. Enter the department budget (6-digit fund number) to or from which the funds are being transferred.
6. Enter the department budget (4-digit org number) to or from which the funds are being transferred.
7. Enter the account code (5-digit number) to or from which the funds are being transferred.
8. Enter the activity code (if applicable) to or from which the funds are being transferred. Use an activity code only in conjunction with account codes 60102, 60103, 60110, 60126, 60133, 60136, 60151, 60157, or 60160.
9. If requesting that the dollar amount for the fund-org-account listed be increased (increased expense or increased income), enter the dollar amount of that increase here. Round miscellaneous cents up and use only whole dollar amounts.
10. If requesting that the dollar amount for the fund-org-account listed be decreased (increased expense or increased income), enter the dollar amount of that decrease here. Round miscellaneous cents up and use only whole dollar amounts.
11. Use this blank to fill in with either “T,” which stands for “temporary transfer” (temporary transfers affect the current-year budget allocation) or “P,” which stands for “permanent transfer” (permanent transfers affect budget allocation now and in the future years). Permanent transfers are rare and require attention from the area VP. The vast majority of budget transfers are temporary.
12. Description of reason to transfer: for record keeping and budget tracking
13. Total increase: If you are using the online Excel version of this form, this column will total automatically. If you are using a printed form, you'll need to total the dollar amounts at the bottom of this column. (Please note: The total dollar amounts in the “increase” and “decrease” columns must be equal.)
14. Total decrease: If you are using the online Excel version of this form, this column will total automatically. If you are using a printed form, you'll need to total the dollar amounts at the bottom of this column. (Please note: The total dollar amounts in the “increase” and “decrease” columns must be equal.)
15. Explain the reason for the budget change/transfer.
16. Signature of the dean or director of the department requesting the budget change
17. Signature of the VP
18. Signature for budget approval (for Finance Office use only).

**NOTE: Other copies of this form should be clearly marked “COPY.” This will prevent duplications of budget changes, in case duplicate copies are accidentally sent to the Finance Office.**



BUDGET CHANGE REQUEST

DOC NUMBER: \_\_\_\_\_

ORIGINATOR: 1

BUDGET YEAR: 2

EXT: 3

DATE: 4

								* AMOUNT			
FUND (6)	ORGN (4)	ACCT (5)	ACTV CODE (6)	INCREASE	DECREASE	T/P	DESCRIPTION (Max 35 Characters)				
5	6	7	8	9	10	11	12				
1											
2											
3											
4											
5											
6											
7											
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15											
16											
17											
18											
19											
20											
<b>TOTALS</b>				<b>13</b>	<b>14</b>						

EXPLANATION: \_\_\_\_\_ **15**

\* INCREASE = Increase Expense or Increase Income  
DECREASE = Decrease Expense or Decrease Income

APPROVALS	Dept. Head	<b>16</b>	VP Office	<b>17</b>	Finance Office	<b>18</b>
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