



# Budget Transfer Form

University of North Carolina School of the Arts

Please download and complete this form to transfer budget between Labor Accounts and Operating Pools that can't be accessed in Banner Self-Service. Send completed and signed form to **BudgetOfficeForms@uncsa.edu** for review.

Budget Office Use Only	
Journal Entry:	
Transaction Date:	
Budget Period:	Rule Code:

### SELECT ONE:

- Recurring Transfer: permanent transfer that remains in effect **beyond** the current fiscal year **(only applies to STATE funds, i.e. funds starting in 1)**
- Non-Recurring Transfer: one-time transfer that **only** affects the current fiscal year

### SELECT ONE:

- Flex Transfer: any transfer between two or more **STATE funds** with **different purpose codes** (101, 152, etc.); **OR** any transfer in or between **STATE funds** that moves budget to, from, or between **Labor Accounts** (611100, 612100, etc.) -- *in either case, REQUIRES Vice Chancellor or Provost approval (below)*
- Non Flex Transfer: any transfer in a **NON-STATE fund (i.e. funds starting in 3, 5\*, or 6)**; **OR** any transfer in or between **STATE funds** with the **same purpose code** (101, 152, etc.) that **ONLY** moves budget between **Operating Pools** (71800P, 72000P, etc.) **OR** within a **single Labor Account** (ex: 611100)
- Position to Position Transfer: any **RECURRING** transfer within a **single STATE fund AND** within a **single Labor Account** (ex: 611100) that **ONLY** moves budget between two or more **POSITION numbers** *(not needed for NON-RECURRING transfers or for NON-STATE funds)*

\*Transfers in endowment funds (starting in 5) **MAY** require a Revised Endowment Plan For Use Form to be completed.

### TRANSFER

Amounts in **WHOLE DOLLARS** Only

Fund	Labor Account or Operating Pool	Purpose Code <small>(first 3 digits of STATE fund)</small>	Position Number <small>(if applicable)</small>	Labor Account or Operating Pool Description	Increase (+)	Decrease (-)
<b>TOTAL</b>						

### DETAILED JUSTIFICATION

Originator

Date

Vice Chancellor / Provost Approval

Vice Chancellor / Provost Approval **MUST** be obtained for all **Flex Transfers** before sending them to the Budget Office. This step is **NOT** required for **Non Flex Transfers** or **Position to Position Transfers**.

Increases must **EQUAL** Decreases