



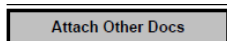
Cost Transfer Request Form with Review and Documentation Checklist

Instructions

This form is required for all Cost Transfer Requests. Please complete this form in its entirety. If you have questions about the form or the Cost Transfer Policy, please contact your school level approver listed on the Office for Sponsored Programs [Cost Transfer Policy](#).



To complete this form, enter text in the required fields.



You may use the buttons to select files from your computer to add attachments to this PDF.



You are not required to add attachments for all buttons in the form. **To open the Attachments panel, choose View>Show/Hide>Side Panels or Navigation Panes>Attachments. Another option to view attachments uploaded is to use the paperclip icon on the left toolbar.** Please only add attachments that are relevant to support the cost being moved onto a federal award and provide evidence of any over 90-day exceptions. Note: Macro-enabled excel files cannot be uploaded into PDF forms. Please attach separately in email.



Use the Save icon to save the PDF as a fillable file. Please do not “print to PDF” or scan a hard copy of the form. Doing this will not allow attachments to be viewed and text in the text boxes cannot be expanded.



Electronic signatures are preferred. Please do not “lock” when signing unless you are the final approver of the form. If you lock the form while signing, no changes can be made to this PDF form.



Once you have signed this document, please send it to the next approver for review.

Cost Transfer Request Form with Review and Documentation Checklist

1. Transaction Details

Date of earliest transaction on the general ledger:

Moving to (list all debits that apply):

Org #/Name

Fund.activity.suba
ctivity

Amount being debited on draft journal:

2. Type of Cost Transfer

What type of Cost Transfer is this? Check the relevant option. For over 90-day Cost Transfers upload support for the exception:

Under 90-day or day 90 (use the [Cost Transfer Calculator](#))

Over 90-day: Delayed issuance of a relevant Action Memo (dated within 60 calendar days)

Over 90-day: Failure of another department to take action

Over-90 day: Sponsor requirement dictates the need for the cost transfer

Over-90 day: A debit to correct a credit to a federal award Over 90-day:

Over-90 day: Other extenuating circumstances; please describe:

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4. Review Criteria

Before submitting, please review and confirm criteria below by checking the box and upload support.

Review Criteria:

Verify if the situation is a cost transfer that requires Cost Transfer approval (see CT Flow Chart for guidance)

Confirm that the Debiting Account is not overspent in GMAS and all accounts are active.

Ensure the CT request does not affect a confirmed final figure.

Confirm compliance with Fly America Act, VJF and Debarment requirements.

Required Documentation and Approval:

**Draft or out of balance journal with proper CT naming convention
“CT^school^org^initials^see related CT form...” (macro-enabled excel files cannot be uploaded. Attach separately in email.)**

Transaction Listing of relevant original charges

Notice of Award

Other Supporting Evidence if applicable that supports allowability, allocability and reasonableness if not included as part of over-90 days exceptions above.

Approval Criteria (approver review and confirm):

Confirm the description of all cost attributes in the Transaction Listing of the original charges matches the draft journal

Ensure that supporting documentation is included for proper justification

Ensure this Cost Transfer request package can stand alone

Confirm that all costs are allowable, allocable and reasonable on the debiting account.

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5. Signatures

Note: If the transfer moves charges to another department (or "org"), attach email approval from the other department under the "Other Documents" button above.

Preparer Name	Date	Signature
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Department Approver Name (required for FAS and HMS)	Date	Signature
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Authorized Approver Name for under 90 days	Date	Signature
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Authorized School/Tub Name Level for over 90 days	Date	Signature
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OSP Approver Name for over 90 days	Date	Signature
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Other Department Name(s) (If transferring to another org)	Date	Signature
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Best practices: Upload approved CT journal within 5 business days and upload signed CT package with proper file name, e.g., CT_HUFund#_under90 or over90, into GMAS segment document repository.