

BANNER 9

Grants & Contracts Accounting (GCA)
Cheat Sheets

Version 1 – May 2020

TABLE OF CONTENTS

APPENDICES







<i>Buttons.....</i>	<i>3</i>
<i>Banner Keyboard Shortcuts.....</i>	<i>4-5</i>

GRANTS AND CONTRACTS ACCOUNTING

<i>How to Review a Restricted (Grant) Budget Balance in FRIGITD.....</i>	<i>7</i>
<i>How to Verify if a Budget Change has been Completed.....</i>	<i>8-9</i>
<i>How to Verify if a Cost Transfer has been Completed.....</i>	<i>10-11</i>
<i>How to Verify which Department should approve a NSF in Banner.....</i>	<i>12-14</i>
<i>Budget Change Request Form.....</i>	<i>15</i>
<i>Cost Transfer Justification Form.....</i>	<i>16</i>

Buttons

Banner admin pages include several buttons.

Button	Description
Add and Retrieve 	Use the Add and Retrieve buttons to interact with Banner Document Management (xTender) to properly store and review documents.
Go 	Use the Go button to advance to the body of the page after populating the key block.
Save 	Use the Save button to save changes on the page. The Save button is located on the bottom right side of the page.
Section Navigation 	Use the Next Section button to navigate to the next section of data. Use the Previous Section button to navigate to the previous section of data. The Next Section and Previous Section buttons are located at the bottom left of each page.
Select and Cancel 	Use the Select button to select and retrieve data from a called page to the current page. Use the Cancel button to return to the called page without retrieving any data. When you need to go to a secondary or called page to retrieve data, the Select and Cancel are presented at the bottom of the page.
Start Over 	Use the Start Over button to return to the key block of the page.

Banner Keyboard Shortcuts

Action	Banner 9 Keystroke	Banner 8 Keystroke
Cancel Page, Close Current Page, or Cancel Search/Query	Ctrl + Q	Ctrl + Q
Change MEP Context	Alt + Shift + C	
Choose/Submit	Enter	Enter
Clear All in Section	Shift + F5	Shift + F5
Clear One Record	Shift + F4	Shift + F4
Clear Page or Start Over	F5	Shift + F7
Count Query	Shift + F2	Shift + F2
Delete Record	Shift + F6	Shift + F6
Down/ Next Record	Down Arrow	Down Arrow
Duplicate Item	F3	F3
Duplicate Selected Record	F4	F4
Edit	Ctrl + E	Ctrl + E
Execute Filter Query	F8	F8
Exit	Ctrl + Q	Ctrl + Q
Expand/ Collapse Drop Down Field	Alt + Down Arrow	Click Field
Export	Shift + F1	Extract Data with Key or Extract Data no Key
First Page	Ctrl + Home	
Insert/ Create Record	F6	F6
Last Page	Ctrl + End	
List of Values	F9	F9
More Information	Ctrl + Shift + U	Alt + H
Next Field or Item	Tab	Tab
Next Page Down	Page Down	Page Down
Next Section	Alt + Page Down	Ctrl + Page Down
Open Menu Directly	Ctrl + M	F5
Open Related Menu	Alt + Shift + R	
Open Tools Menu	Alt + Shift + T	
Page Tab 1 Page Tab 2, etc.	Ctrl + Shift + 1 Ctrl + Shift	
Previous Field or Item	Shift + Tab	Shift + Tab
Previous Page Up	Page Up	Page Up
Previous Section	Alt + Page Up	Ctrl + Page Up
Print	Ctrl + P	Shift + F8
Refresh or Rollback	F5	Shift + F7
Save	F10	F10
Search or Open Filter Query	F7	F7
Select on a Called Page	Alt + S	Shift + F3
Toggle Multi/ Single Records View	Ctrl + G	
Up/Previous Record	Up Arrow	Up Arrow

Workflow		
Release Workflow	Alt + Q	Icon or Menu
Submit Workflow	Alt + W	Icon or Menu

Action	Banner 9 Keystroke	Banner 8 Keystroke
Banner Document		
Add BDM Documents	Alt + A	Icon or Menu
Retrieve BDM Documents	Alt + R	Icon or Menu

Application Navigator		
App Nav - Access Help	Ctrl + M	
App Nav - Access Menu	Ctrl + Y	
App Nav - Display Recently Opened Items	Ctrl + Shift + L	
App Nav - Search	Ctrl + Shift + Y	
App Nav - Sign Out	Ctrl + Shift + F	

Grants & Contracts Accounting

How to Review a Restricted (Grant) Budget Balance in FRIGITD

Grant Inception to Date - FRIGITD

This Banner form allows you to view a grant's **current balance** – current budget, current cumulative expenses, cumulative encumbrances by account, and the available budget balance. This form cannot be used to review non-grant budgetary information.

1. Enter form FRIGITD
2. Enter the FUND number next to the blank that says **Fund:**

Chart of Accounts: N Grant: Index: Organization: Activity: Account Type: Account Summary: All Levels Date From (MM/YY): Date To (MM/YY):

Fund: 204212

Program: Location: Account: Include Revenue: Exclude Indirect: Costs: Fund Summary:

By Sponsor Account:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

3. Hit tab, then delete the auto populated Organization number; hit tab again and delete the auto populated Program number. **Step #3 is the most important step to ensure you get accurate results.**
4. Click GO

Account	Type	Description	Adjusted Budget	Activity	Commitments	Available Balance
61003	L	Principal Investigator	6,054.12	6,054.12	0.00	0.00
61008	L	Other Salaries	9,150.65	6,000.00	0.00	3,150.65
61010	L	Graduate Assistant	35,714.45	34,952.99	0.00	761.46
61011	L	Wages Students	73,949.59	76,100.24	0.00	-2,150.65
62001	L	Social Security	535.50	6,599.97	0.00	-6,064.47
62002	L	Social Security Fed Matching	5,267.00	0.00	0.00	5,267.00
62003	L	Retirement Matching	3,517.00	9,562.21	0.00	-6,045.21
62004	L	Retirement Matching Federal	8,895.70	0.00	0.00	8,895.70
62005	L	Group Insurance Life	341.50	339.75	0.00	1.75
62006	L	Group Insurance Hospital	19,301.70	20,458.00	0.00	-1,156.30
NET TOTAL			300,000.00	275,781.20	1,339.08	22,879.72

The last row will give you the net total balances for each column. Also, you can use the blue arrows at the bottom to review additional rows of information.

How to Verify if a Budget Change has been Completed

Budget Change Request Form – form used to adjust budgetary line items.

BUDGET CHANGE DETAIL				
FOAP(S) TO BE INCREASED				
FUND	ORGANIZATION	ACCOUNT	PROGRAM	AMOUNT
604031	21100	73006	500	1996.55
TOTAL				1,996.55
FOAP(S) TO BE DECREASED				
604031	21100	73005	500	1996.55
TOTAL				1,996.55

1. Enter form FRIGITD
2. Follow steps 2-4 in the section **How to Review a Restricted (Grant) Budget Balance in FRIGITD.**
3. Click in the Adjusted Budget column of the line item (account code) that is being increased.

Grant Inception to Date FRIGITD 9.3.8 (PROD)									
Chart of Accounts: N Grant: 604031 FY 19 SAFRA Carryover Grant Year: Index: Fund: 604031 Organization: Program: Activity: Location: Account Type:									
Account: Account Summary: All Levels Date From (MM/YY): 10 / 18 Date To (MM/YY): 04 / 20 Include Revenue Accounts: <input type="checkbox"/> Exclude Indirect Costs: <input type="checkbox"/>									
Hierarchy: <input type="checkbox"/> Fund Summary: <input type="checkbox"/> By Sponsor Account: <input type="checkbox"/>									
GRANT INCEPTION TO DATE									
Account	Type	Description	Adjusted Budget	Activity	Commitments	Available Balance			
73005	E	Other Supplies	131,779.85	80,265.48	3,769.57	47,744.80			
73006	E	Food Purchases	1996.55	0.00	0.00	1,996.55			
73403	E	In State Travel	2,000.00	1,046.49	866.14	87.37			

- Click RELATED (top right corner) and then click Grant Detail Information (FRIGTRD).

Grant Inception to Date FRIGTRD 9.3.8 (PROD)

Chart of Accounts: N Grant: 604031 FY 19 SAFRA Carryover Grant Year: Index: Fund: 604031 Organization: Program: Activity: Location: Account: Search

Account: Account Summary: All Levels Date From (MM/YY): 10 / 18 Date To (MM/YY): 04 / 20 Include Revenue Accounts: Exclude Indirect Costs: Hierarchy: Fund Summary: By Sponsor Account:

GRANT INCEPTION TO DATE

Account	Type	Description	Adjusted Budget	Activity	Commitments
73005	E	Other Supplies	131,779.85	80,265.48	
73006	E	Food Purchases	1996.55	0.00	
73403	E	In State Travel	2,000.00	1,046.49	
73404	E	Out of State Travel	40,000.00	205.00	

Grant Detail Information [FRIGTRD]

- Budget Changes are indicated with the Type BD02.

Grant Transaction Detail Form FRIGTRD 9.3.6 (PROD)

COA: N Grant: 604031 Index: Fund: 604031 Organization: 21100 Account: 73006 Program: 500 Activity: Location: Commit: Year: Period: Start Over

Date From: 10/01/2018 Date To: 04/30/2020 Pool:

GRANT TRANSACTION DETAIL

Account	Organization	Program	Activity Date	Type	Document	Description	Commit	Fund	Activity	Location	Transaction Date	Field
73006	21100	500	04/24/2020	BD02	J0023606	Budget change	U	604031			04/01/2020	ABD

Record 1 of 1

- Slide the gray bar at the bottom of the screen to the right in order to see the amount column.

Grant Transaction Detail Form FRIGTRD 9.3.6 (PROD)

COA: N Grant: 604031 Index: Fund: 604031 Organization: 21100 Account: 73006 Program: 500 Activity: Location: Commit: Year: Period: Start Over

Date From: 10/01/2018 Date To: 04/30/2020 Pool:

GRANT TRANSACTION DETAIL

Document	Description	Commit	Fund	Activity	Location	Transaction Date	Field	Amount	Increase(+) or Decrease(-)
23606	Budget change	U	604031			04/01/2020	ABD	1,996.55	+
Total								1,996.55	+

Record 1 of 1

- To verify if the budget of another line item (account code) was adjusted, click the top left X to close the screen and return back to the FRIGTRD screen.
- Repeat steps 2-5 to view each line item (account code) listed on the Budget Change form.

How to Verify if a Cost Transfer has been Completed

Cost Transfer Justification Form – form used to transfer expense(s) from one FOAP to another.

Please provide a detailed statement (i.e. employee name; employee A#; pay period; invoice number; purchase order number; vendor; transaction date, etc.) explaining your selection and how the error occurred:

INV I0158127 - \$750.00 (see attached documentation)
Req R008837 to the Huntsville Marriott Space and Rocket Center

*2. What is the FOAP that the expense was originally charged to?

250207-20515-73903-160

*3. What is the FOAP that the expense is to be transferred to?

250213-20415-73903-160

1. Enter form FRIGITD
2. Follow steps 2-4 in the section **How to Review a Restricted (Grant) Budget Balance in FRIGITD** using the fund number from #2 in the Cost Transfer form. This will be the fund number that the amount is being moved from.
3. Click in the Activity column of the line item (account code) that the amount is being moved from.

ellucian Grant Inception to Date FRIGITD 9.3.8 (PROD) ADD RETRIEVE RELATED TOOLS

Chart of Accounts: N Grant: 250207 Regional In Service Grant Year: Index: Fund: 250207 Organization: Program: Activity: Location: Account Type: Start Over

Account: Account Summary: All Levels Date From (MM/YY): 09 / 18 Date To (MM/YY): 04 / 20 Include Revenue Accounts: Exclude Indirect Costs:

Hierarchy: Fund Summary: By Sponsor Account:

GRANT INCEPTION TO DATE							Insert	Delete	Copy	Filter
Account	Type	Description	Adjusted Budget	Activity	Commitments	Available Balance				
61004	L	Salaries Administration	84,683.00	99,362.76	0.00	-14,679.76				
61005	L	Salaries Secretarial Clerical	25,999.00	25,998.47	0.00	0.53				
61011	L	Wages Students	4,798.00	0.00	0.00	4,798.00				
62001	L	Social Security	8,834.22	9,552.05	0.00	-717.83				
62003	L	Retirement Matching	13,737.68	15,284.73	0.00	-1,547.05				
62005	L	Group Insurance Life	498.07	342.37	0.00	155.70				
62006	L	Group Insurance Hospital	16,502.69	19,222.05	0.00	-2,719.36				
62007	L	Unemployment Compensation Ins	44.27	250.74	0.00	-206.47				
62008	L	Workers Compensation Insurance	11.07	0.00	0.00	11.07				
73001	E	Office Supplies	750.00	694.33	87.04	-31.37				
73002	E	Instructional Supplies	3,500.00	2,488.13	0.00	1,011.87				
73402	E	Travel	10,000.00	7,408.12	607.90	1,983.98				
73404	E	Out Of State Travel	0.00	650.60	0.00	-650.60				
73601	E	Telephone	2,000.00	2,061.48	0.00	-61.48				
73903	E	Other Rental	2,500.00	1928.21	0.00	571.79				
73904	E	Vehicle Rental	2,500.00	515.88	0.00	1,984.12				

- Click RELATED (top right corner) and then click Grant Detail Information (FRIGTRD).

Grant Inception to Date FRIGTD 9.3.8 (PROD)

Chart of Accounts: N Grant: 250207 Regional In Service Grant Year: Index: Fund: 250207 Organization: Program: Activity: Location: Account Type: Search

Account: Account Summary: All Levels Date From (MM/YY): 09 / 18 Date To (MM/YY): 04 / 20 Include Revenue Accounts: Exclude Indirect Costs:

Hierarchy: Fund Summary: By Sponsor Account:

GRANT INCEPTION TO DATE

Account	Type	Description	Adjusted Budget	Activity	Commitments
61004	L	Salaries Administration	84,683.00		99,362.76
61005	L	Salaries Secretarial Clerical	25,999.00		25,998.47
61011	L	Wages Students	4,798.00		0.00
62001	L	Social Security	8,834.22		9,552.05
62003	L	Retirement Matching	13,737.68		15,284.73

- Cost Transfers are indicated with either Type FT01 or JE15.

Grant Transaction Detail Form FRIGTRD 9.3.6 (PROD)

COA: N Grant: 250207 Index: Fund: 250207 Organization: 20415 Account: 73903 Program: 160 Activity: Location: Commit: Year: Period: Start Over

Date From: 09/27/2018 Date To: 04/30/2020 Pool:

GRANT TRANSACTION DETAIL

Account	Organization	Program	Activity Date	Type	Document	Description	Commit	Fund	Activity	Location	Transaction Date	Field
73903	20415	160	03/18/2020	FT01	J0023491	REIC Other Rental, Space Ce...	U	250207			01/08/2020	Y
73903	20415	160	01/09/2020	INEI	10158127	Space Center Hotels, LLC	U	250207			01/08/2020	Y
73903	20415	160	04/23/2019	INEI	10149602	Space Center Hotels, LLC	U	250207			04/22/2019	Y
73903	20415	160	04/01/2019	INEI	10148705	Space Center Hotels, LLC	U	250207			03/28/2019	Y

Record 1 of 4

- Slide the gray bar at the bottom of the screen to the right in order to see the amount column.

Grant Transaction Detail Form FRIGTRD 9.3.6 (PROD)

COA: N Grant: 250207 Index: Fund: 250207 Organization: 20415 Account: 73903 Program: 160 Activity: Location: Commit: Year: Period: Start Over

Date From: 09/27/2018 Date To: 04/30/2020 Pool:

GRANT TRANSACTION DETAIL

Document	Description	Commit	Fund	Activity	Location	Transaction Date	Field	Amount	Increase(+) or Decrease(-)
23491	REIC Other Rental, Space Ce...	U	250207			01/08/2020	YTD	-750.00	-
58127	Space Center Hotels, LLC	U	250207			01/08/2020	YTD	750.00	+
49602	Space Center Hotels, LLC	U	250207			04/22/2019	YTD	1,728.21	+
48705	Space Center Hotels, LLC	U	250207			03/28/2019	YTD	200.00	+
Total								1,928.21	+

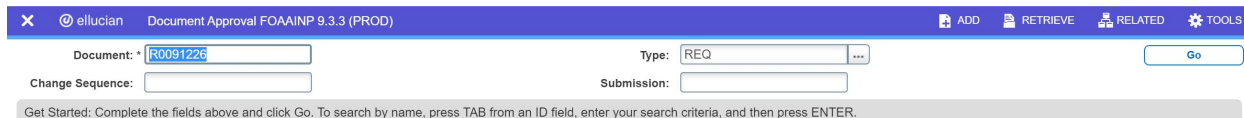
Record 1 of 4

- If the amount is being moved from the fund, there should be a negative (-) in front of the amount.
- To verify if the amount was posted to the correct fund, click the top left X to close the screen and return back to the FRIGITD screen. Then click Start Over to enter the fund number from #3 in the Cost Transfer form. This will be the fund number that the amount is being moved to.
- Repeat steps 2-6.
- If the amount is being moved to the fund, there should be a positive number in the amount column.

How to Verify which Department should approve a NSF in Banner

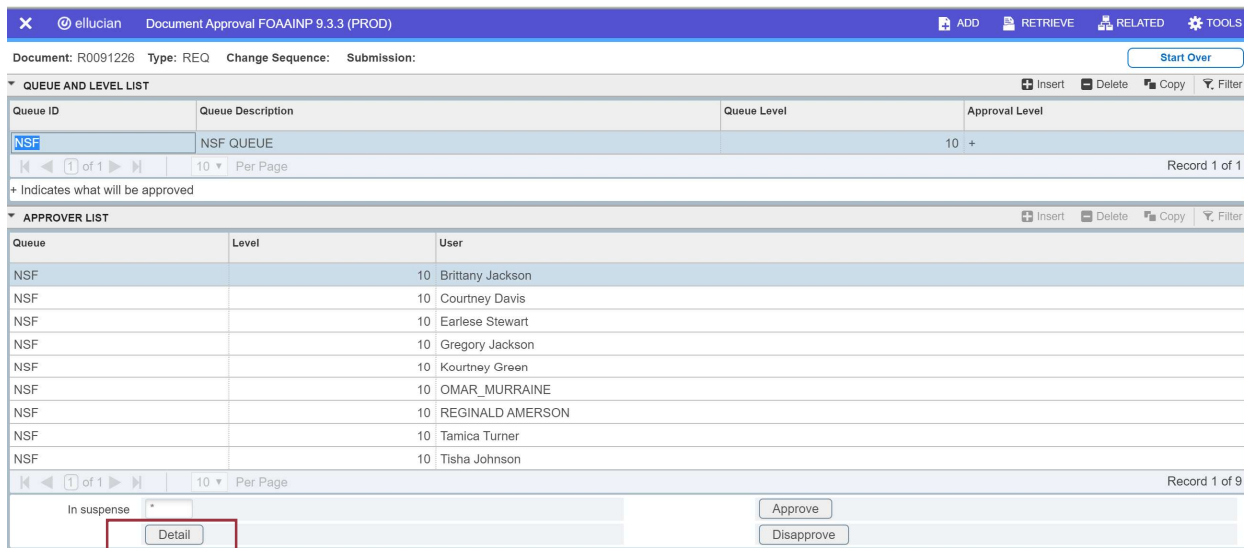
The **NSF or Non-Sufficient Funds** functionality in Banner is a tool used to prohibit transactions from processing without sufficient budget. This functionality allows for additional review before approval is granted.

1. Enter form FOAAINP
2. Enter requisition or encumbrance number next to Document:



The screenshot shows the Banner Document Approval FOAAINP 9.3.3 (PROD) search screen. The top navigation bar includes a close button, the user 'ellucian', the title 'Document Approval FOAAINP 9.3.3 (PROD)', and action buttons for ADD, RETRIEVE, RELATED, and TOOLS. Below the navigation bar, there are input fields for 'Document:' (containing 'R0091226'), 'Type:' (containing 'REQ'), 'Change Sequence:', and 'Submission:'. A 'Go' button is located to the right of the 'Type' field. Below these fields is a grey instruction bar that reads: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

3. Click GO
4. The approver list will appear. **Please note, the order of users listed does not indicate who is the next approver.** The list is of individuals with the credentials to approve NSFs in alphabetical order by first name.



The screenshot shows the Banner Document Approval FOAAINP 9.3.3 (PROD) results screen. The top navigation bar is the same as the previous screen. Below the navigation bar, the document details are displayed: 'Document: R0091226 Type: REQ Change Sequence: Submission:'. A 'Start Over' button is located to the right. Below the document details is a section titled 'QUEUE AND LEVEL LIST' with a table showing the queue information. The table has columns for 'Queue ID', 'Queue Description', 'Queue Level', and 'Approval Level'. The first row shows 'NSF' for the Queue ID, 'NSF QUEUE' for the Queue Description, '10' for the Queue Level, and '10 +' for the Approval Level. Below the table is a section titled 'APPROVER LIST' with a table showing the list of approvers. The table has columns for 'Queue', 'Level', and 'User'. The first row shows 'NSF' for the Queue, '10' for the Level, and 'Brittany Jackson' for the User. The table lists 9 approvers in alphabetical order by first name. Below the table is a section titled 'In suspense' with a 'Detail' button highlighted by a red box. There are also 'Approve' and 'Disapprove' buttons.

Queue ID	Queue Description	Queue Level	Approval Level
NSF	NSF QUEUE	10	10 +

Queue	Level	User
NSF	10	Brittany Jackson
NSF	10	Courtney Davis
NSF	10	Earlese Stewart
NSF	10	Gregory Jackson
NSF	10	Kourtney Green
NSF	10	OMAR_MURRAINE
NSF	10	REGINALD AMERSON
NSF	10	Tamica Turner
NSF	10	Tisha Johnson

5. Click on Detail in the bottom left corner to see the details of the document.

6. The two (2) key things to look for when determining which department is responsible for approving your NSF are the **fund number** and the **NSF indication**.
 - a. Fund Number
 - i. State funds (110000 & 100001) are approved by the **Budget Office**
 - ii. Grant funds (2XXXXX & 6XXXXX) are approved by **Grants & Contracts Accounting**
 - b. NSF Indication
 - i. For **Requisitions**: a (Y) next to NSF means “Yes” the FOAP is in NSF; a (N) next to NSF means “No” the FOAP is not in NSF.
 - ii. For **Encumbrances**: a (N) next to NSF means the FOAP in is “NSF”; a (P) next to NSF means the FOAP is “Pending” and not in NSF.
7. See examples below

Requisitions:

Example #1 The requisition below is in NSF and should be approved by the **Budget Office**.

Requisition Approval FOQRACT 9.0 (PROD)			
Request R0091226 Dr. L. Walker/E.Cebert/SJ		Number of Items 1	
<div>REQUISITION APPROVAL</div> <div>Insert Delete Copy Filter</div>			
<div>LINE ITEM INFORMATION</div> <div>Insert Delete Copy Filter</div>			
Item	Net	3,862.50	
Commodity Document Acctg Distribution	Vendor	A00361974 Madison County Cooperative, Inc.	
<div>1 of 1</div> <div>1 Per Page</div>		Record 1 of 1	
<div>ACCOUNTING INFORMATION</div> <div>Insert Delete Copy Filter</div>			
Sequence Number	1	Location	
COA	N	Extended Amount	3,862.50
Fiscal Year	20	Discount Amount	0.00
Index		Tax Amount	0.00
Fund	110000	Additional Amount	0.00
Organization	20118	Total	3,862.50
Account	73005	Project	NSF Y
Program	140	<input type="checkbox"/> NSF Override	
Activity			
<div>1 of 1</div> <div>1 Per Page</div>		Record 1 of 1	

Example #2 The requisition below has 2 funds but only 1 is in NSF. This one should be approved by **Grants and Contracts Accounting**.

Request R009128E Martha Palmer				Number of Items 6	
LINE ITEM INFORMATION					
Item		Net 1,298.00			
Commodity Document Acctg Distribution		Vendor A00242245 CDW LLC			
Record 1 of 6					
ACCOUNTING INFORMATION					
Sequence Number 1		Location			
COA N		Extended Amount 649.00			
Fiscal Year 20		Discount Amount 0.00			
Index		Tax Amount 0.00			
Fund 110000		Additional Amount 0.00			
Organization 232039		Total 649.00			
Account 73005		Project			
Program 140		NSF N			
Activity		<input type="checkbox"/> NSF Override			
Sequence Number 2		Location			
COA N		Extended Amount 649.00			
Fiscal Year 20		Discount Amount 0.00			
Index		Tax Amount 0.00			
Fund 232039		Additional Amount 0.00			
Organization 20116		Total 649.00			
Account 73005		Project			
Program 140		NSF Y			
Activity		<input type="checkbox"/> NSF Override			

Encumbrance:

The encumbrance below is in NSF and should be approved by **Grants and Contracts Accounting**.

Encumbrance/Reservations Approval FOQENCB 9.0 (PROD)				ADD RETRIEVE RELATED TOOLS	
ENCUMBRANCE/RESERVATIONS APPROVAL				Insert Delete Copy Filter	
Encumbrance Number E0058742 TRIO-Upward Bound Program		Document Total 70.00			
Transaction Date 03/27/2020					
TRANSACTION DETAIL INFORMATION				Insert Delete Copy Filter	
COA N		Program 160			
Journal Type E100 Original Encumbrance		Activity			
Sequence Number 1		Location			
Fiscal Year 20		Project			
Index		Current			
Fund 630017		Encumbrance			
Organization 21405		Amount			
Account 74309		Amount 70.00			
		NSF N			
		<input type="checkbox"/> NSF Override			
Record 1 of 1					

ALABAMA A&M UNIVERSITY
REQUEST FOR BUDGET CHANGE
(TRANSFER OF BUDGET WITHIN RESTRICTED FUND)

SEND ORIGINALS THROUGH CHANNELS
TO BUSINESS OFFICE

DATE _____

REQUESTING ORGANIZATION _____
(SCHOOL OR DEPARTMENT)

REQUESTING FUND _____
(GRANT OR CONTRACT TITLE)

BUDGET CHANGE DETAIL

FOAP(S) TO BE INCREASED				
FUND	ORGANIZATION	ACCOUNT	PROGRAM	AMOUNT
			TOTAL	
FOAP(S) TO BE DECREASED				
			TOTAL	

BUDGET CHANGE JUSTIFICATION _____

REQUESTED BY(BUDGET MANAGER) _____

APPROVED BY (DEAN) _____

APPROVED BY (VICE PRESIDENT) _____

***1. What is the reason for the cost transfer?**

- ☐ Correction of an erroneously charged expense
- ☐ Reallocate estimated effort to reflect actual effort
- ☐ Other

Please provide a detailed statement (i.e. employee name; employee A#; pay period; invoice number; purchase order number; vendor; transaction date, etc.) explaining your selection and how the error occurred:

***2. What is the FOAP that the expense was originally charged to?**

***3. What is the FOAP that the expense is to be transferred to?**

***4. Is the cost transfer request being submitted within 90 days of the end of the calendar month that the expenditure posted?** ☐ Yes ☐ No

If no, please explain the extenuating circumstances:

***5. Please justify how the cost is necessary to the aims/goals of the sponsored project that it is to be transferred to:**

Department _____ PI Name _____

PI Signature _____ Date _____

Office of Budget & Planning _____ Date _____

Office of Sponsored Programs _____ Date _____

***Required Fields**

GCA Office Use Only:

Date Received _____

Completion Date _____ Accountant Signature _____