Instructions

Grant Expense Transfer Form
(within fund)

1. Enter the Fund, Organization (Org), Program, Fund Banner Name, and Principal Investigator (PI)/Financial Manager for the grant that you are processing an expense transfer for. This information can be found on the Grant Profile Sheet in the “New Grant” email you received from Theresa Orwell regarding the initial setup of the grant.

2. Enter the account number and the account name that you are transferring the expense From.

3. Enter the account number and the account name that you are transferring the expense To.

4. Enter the amount. If your transfer contains multiple accounts in the “From” or “To” column, please enter the amounts on the respective lines. (See example 2).

5. Please explain the reason for your transfer.

6. Please sign and date.

7. Attach supporting documentation.

8. Send the completed, signed form and support to Grants Accounting via email at grantsacct@ysu.edu

Contact Grants Accounting for any questions you may have regarding the above form/instructions.
**Example 1 - "From" & "To" Account**

**Grant Expense Transfer Form (within fund)**

<table>
<thead>
<tr>
<th>From:</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Account Name</td>
</tr>
<tr>
<td>701115</td>
<td>Chemical Supplies</td>
</tr>
</tbody>
</table>

**Reason for transfer:**

Expense was incorrectly charged to 701115. Staples invoice invoice #105 should be charged to account 701105 (see attached invoice).

**PI/Financial Manager Signature:** ____________________________  **Date:** ____________________________

*Send email with this completed document to Grants Accounting along with supporting documentation*

**Grants Accounting approval:** ____________________________  **Date:** ____________________________

**Grants Accounting posted by:** ____________________________  **Date:** ____________________________

**JE15 Document #** ____________________________
Example 2 - Multiple "From" & "To" Accounts

Grant Expense Transfer Form
(within fund)

<table>
<thead>
<tr>
<th>From</th>
<th>Account Number</th>
<th>Account Name</th>
<th>To</th>
<th>Account Number</th>
<th>Account Name</th>
<th>$ Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>701115</td>
<td>Chemical Supplies</td>
<td></td>
<td>701105</td>
<td>Office Supplies</td>
<td></td>
<td>$500.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>701110</td>
<td>Instructional Supplies</td>
<td></td>
<td>$200.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$300.00</td>
</tr>
</tbody>
</table>

Reason for transfer:
Expense was incorrectly charged to 701115. Barnes & Noble invoice invoice #102 should be allocated to accounts 701105 & 701110 as shown above (see attached invoice).

PI/Financial Manager Signature: ____________________ Date: ____________

Send email with this completed document to Grants Accounting along with supporting documentation

Grants Accounting approval: ____________________ Date: ____________
Grants Accounting posted by: ____________________ Date: ____________
JE15 Document #: ____________________