



Sponsored Projects Cost Transfer Justification Form (SP-6)

This form is required when a cost is transferred to a sponsored project. Upload completed form to Workday as support documentation when doing the accounting adjustment or journal entry. Cost share adjustments do not require this form.

Contact Information

Date: _____ Completed By: _____ Phone: _____

Worktag Information

Original Account Worktag: _____

New Account Worktag(s): _____

Cost Transfer Type and Amount

This is a justification for a Payroll Cost Transfer (PAA): Yes No

If yes, please provide the employee name and date of original transaction: _____

This is a justification for a Non-Payroll Cost Transfer (accounting adjustment, journal entry): Yes No

If yes, please provide the transaction number(s) and date of the original transaction: _____

Please indicate the total amount transferred: _____

Justification Checklist and Documentation

Please check the budget before completing this section.

Has the item been transferred previously? Yes No

If yes, please provide a justification for the additional transfer: _____

Please explain the reason the expense(s) was originally charged to the incorrect worktag or award.

Please explain how the transfer benefits the award(s) to which it is being moved.

Please explain what action has been taken to eliminate the need for this type of cost transfer in the future (e.g., department will review charges to sponsored project accounts on a monthly basis, risk accounts will be set up, etc.)

Transfer Request

The transfer is being requested (check all that apply):

More than 90 days after the posting of the transaction

After effort certification

Less than 45 days prior to the award end date

After the award end date

None of the above applies (below approvals not required)

Approvals

Please review the approval instructions and signature requirements on next page.

Principal Investigator

Chair/Director

Dean/Vice President

Post-Award Manager

For Internal Use (PAAs) Only

Form Approval Instructions

The following approval instructions are based upon the type of transfer requested per the selected checkboxes in the Transfer Request section of the form.

1. More than 90 days after the posting of the transaction: the principal investigator, chair/director, dean/vice president, and Sponsored Projects post-award manager must all approve.
2. After effort certification: the principal investigator, chair/director, and dean/vice president must all approve.
3. Less than 45 days prior to the award end date: the principal investigator and chair/director must both approve.
4. After the award end date: the principal investigator and chair/director must both approve.
5. None of the above applies: No approvals are necessary.

If more than one transfer types applies, then approvals from all applicable transfer types is required, e.g., if the transfer request is after the award end date and after effort certification, the PI, chair/director, and dean/VP must all approve.