



The purpose of the Reassignment of Funds form is to align your annual allocation with your planned expenditures in a current or future fiscal year.

Instructions

1. Account balances should be checked before submitting the Budget Transfer form.
2. Budgeted funds can be reallocated only within a single fund.
3. Select fund from the drop-down menu.
4. Type in the department name, the eight-digit (XXXXXX-XX) account number, use the drop-down menu to select the budget category, and enter the desired amount in the decrease section on the form.
5. Follow Step 3 to complete the increase section.
6. If needed, up to eight (8) debits and credits can be entered on the form.
7. Total Decrease amount must equal the Total Increase amount and amounts must be entered in whole dollars.
8. Use the drop-down menu to select the reason for the Budget Transfer.
9. If the routine reasons do not describe the reason for the transfer, you may include a brief description for the change in the Other/Additional Reason section on the form.
10. Use the drop-down menus to select the appropriate fiscal year and if budget transfer request is a Temporary or Permanent adjustment.
11. The primary account manager must type in his/her name and date the form. Delegates should include their initials after named primary when submitting this form on behalf of the primary account manager. Typing your name in this space constitutes an official signature.
12. Permanent reallocations which include more than one Department, Dean, or Executive area require 2nd approval.
13. If you are requesting to move between major objects (PS/TS/OTPS) VP Finance & Management approval is required before submitting to the Financial Management Office.
14. Submit the completed signed form as an e-mail attachment to financialmanagement@buffalostate.edu. Please do not scan the worksheet or submit a photocopied completed form.
15. The Financial Management Office will review the budget transfer request from the program area and, unless further review is needed, the budget transfer will be completed within three (3) business days of receipt of the request.