

Semel Cost Transfer Justification Form for Direct Retro (DR) and NPEARS

Submit this form to your fund manager. This form applies to all funding sources. If multiple FAUs are involved, you must complete one form per FAU change requested. You are required to complete each question before cost transfers will be processed.

Failure to properly justify the cost transfer will result in the action being **disallowed** during the review process.

*** This form is only required for transfers >120 days after the original transaction date, and/or >90 days after the fund end date**

Requested Action: Direct Retro (DR)

NPEAR

DR Employee Name:

NPEAR Item:

DR UCPATH Empl ID:

Dates being transferred:

Cost is FROM (FAU):

Move Cost TO (FAU):

Sponsor Name:

Sponsor Name:

Please complete the following questions (each section is limited to 254 characters):

How did the error occur and why is the transfer being requested? (If partial transfer, explain basis for proration and/or split.)

Who approved the transfer of funds? (i.e., PI)

How does the transfer benefit or impact the new funding source being charged?

Explain delay if transfer is: > 120 days after original transaction date, and/or > 90 days after the fund end date.

For DRs only - Does transfer impact certified effort report? If so, justify this change and update ERS.

For NPEARS only - What steps have been taken to prevent reoccurrence?

Preparer Name:

Phone:

E-mail:

Authorizing Signature for FAU Receiving Cost Transfer Required for All Actions: (Electronic Signatures NOT Permitted)

I am requesting this cost transfer after review of the ledgers to correctly assign the expense to the appropriate funding source. I understand that I may only move this expense **one** time and will not request this expense to be transferred in the future.

PI Signature _____ Date

Fund Manager Signature _____ Date

The signatures below are only required for transaction dates greater than 90 days on expired funds & 120 days on current funds.

OES Director _____ Date

Department Chair _____ Date