

IFAS Shared Service Centers (SSC)

Budget Transfer Instruction Guide

To standardize processes for all departments, please email all documents (scanned or electronic copies) to the appropriate Shared Service Center ([McCarty](#) or [Fifield](#)). Each email should have a subject line containing [TRANSFER](#). (Example: **Subject: Budget transfer on Project #12345**)

Step 1: Unit discovers a need for a budget transfer

- All Faculty and Staff are responsible for following current regulations as specified in [UF Cost Accounting Guidelines & Policies](#) and [UF Directives & Procedures](#).
- This instruction guide should be used for any requests related to budget including, but not limited to: transfers between categories on a Level 5 grant, internal swaps between Faculty and/or Departments, budget questions/requests on appropriated or SHARE funds, etc.

Step 2: Unit sends request to the SSC

- An email with a subject line as described above should be sent to SSC ([McCarty](#) or [Fifield](#)).
- The email should include a detailed request or question regarding the budget.

Step 3: The SSC receives and processes the request

- SSC receives request or question and works directly with the Faculty or Staff to resolve the request or question.
- In some cases, it will be necessary for the SSC to notify a CORE office in order to complete the task (SSC will copy the requestor on the email):
 - Grant related – Contracts & Grants (C&G)
 - State or Federal – Budget & Finance Office
 - Cash Based – SSC can process directly

Budget quick tips and reminders

- A Level 3 budget is typically unrestricted and funds can be spent outside of the budgeted categories. **Please note** that each sponsor is different and that effort promised in the contract must be reflected.
- A Level 5 budget is restricted to the categories which were originally budgeted. Requests for budget transfers between categories (i.e. from salary to travel) have to be approved by the sponsor. The SSC can assist with obtaining necessary approvals.

Helpful Links

- [UF Finance and Accounting](#)
- [UF Contracts & Grants](#)

For assistance with this process or anything else, please contact your Shared Service Center:

McCarty

Phone: 352-294-3199

Email: mccarty-ssc@ufl.edu

Fifield

Phone: 352-273-4583

Email: fifield-ssc@ufl.edu