Residual Balance Transfer Flowchart

YSM use only

Form 1301 FR.01 Residual Balance Transfer Request

Is it (FD29) Industry Clinical Trial ?

YES → **Request to Transfer Residual Balance from (FD29) Industry Clinical Trials**
Submit Request to *ysmcontroller@yale.edu*

NO

All other Sponsored Awards (FD02, FD28)

Is the Residual Balance <= 25% of the Total Funding?

YES → **Request to Transfer Residual Balance from all other Sponsored Awards (FD02, FD28), requests <=25%**
Submit Request to *SPFA ACCOUNTANT*

NO

Request to Transfer Residual Balance from all other Sponsored Awards (FD02, FD28), requests >25%
Submit Request to *ysmcontroller@yale.edu*

YES → Once signature is secured from **ysmcontroller@yale.edu**, send completed form to **SPFA Accountant**

REVISION 2-10-23