

# University of Delaware: Residual Balance Transfer Request Form

## Instructions

If a residual funding balance remains on a fixed-price sponsored program after all allocable direct and F&A costs have been charged, the PI may use this form to request the residual amount be transferred to a non-sponsored departmental account per the [Residual Balance Policy](#). Residual balances will be distributed proportionately between direct costs and F&A costs, with the direct cost amount being transferred to the administering department. Email completed forms to your Sponsored Research Accountant for final Research Office approvals and processing.

## Request Information

<b>Request Date:</b>	<b>Award End Date:</b>
<b>PI Name:</b>	<b>Total Award Funding:</b>
<b>Sponsor:</b>	<b>Total Residual Balance:</b>
<b>Award Number:</b>	<b>Percent Remaining:</b> %* ( <i>≥20% requires justification</i> )

**Non-Sponsored Departmental Purpose Code** (to receive the direct cost portion of the total residual balance):

Provide additional transfer instructions if needed below:

## Required Certifications, Justifications, and Approval Signatures

**By providing my signature below, I am certifying that all the following award conditions have been met:**

- All work activities have been completed.
- All direct charges have been charged and accounted for properly.
- The applicable amount of F&A costs generated by the expenditures have been recovered.
- All project deliverables have been provided to and accepted by the sponsor.
- All project payments have been received from the sponsor.
- The sponsored agreement terms do not require the University to return the residual balance.

**\*The PI must provide additional justifications below if the total residual balance remaining is greater than or equal to 20% of the total award funding amount.** Justifications must explain (1) why actual costs differ significantly from the original costs projected and (2) how excessive funds remain while still achieving the scope of work.

Principal Investigator  
Signature

Department Administrator  
Signature

Sponsored Research Accountant  
(or Designee) Signature

## \*Additional Approval Signatures for Residual Balances ≥20%

Department Dean/Director  
(or Designee) Signature

VP Research, Scholarship, and Innovation  
(or Designee) Signature