

### **Unobligated Balance Transfer**

Please complete the below in order to transfer an unobligated balance from a fixed-price sponsored agreement to an unrestricted Workday Non-Grant Driver Worktag. Please note that this form should not be used for cost-reimbursable type agreements. Upon completion please secure the appropriate approvals and verifications and then provide the complete form to your [Award Contract Owner](#) for processing.

#### **SPONSORED AGREEMENT INFORMATION**

NAME PRINCIPAL INVESTIGATOR (PI) : \_\_\_\_\_

SPONSOR NAME: \_\_\_\_\_

SPONSOR AWARD NUMBER: \_\_\_\_\_

WORKDAY GRANT (GR) ID: \_\_\_\_\_

#### **UNOBLIGATED BALANCE TRANSFER INFORMATION**

AMOUNT OF UNOBLIGATED BALANCE TO BE TRANSFERRED: \_\_\_\_\_

REQUESTED PERIOD OF USE: \_\_\_\_\_ - \_\_\_\_\_

WORKDAY NON-GRANT DRIVER WORKTAG TO TRANSFER UNOBLIGATE BALANCE: \_\_\_\_\_

#### **CERTIFICATIONS**

Please check the box on each of the below to certify that these actions have been completed. Please note that all the below boxes need to be checked prior to collecting signatures or submitting the form for processing.

This is a fixed price agreement.

All performance requirements including the submission of any required reports and/or deliverables have been satisfied for the Sponsored Agreement and have been accepted by the sponsor.

All costs (internal and external) have been incurred on and paid through the grant(s).

All payments from the sponsor have been received.

All required financial reports have been submitted and accepted by the sponsor.

All documents required in order to close the award at USC have been submitted through the [Final Report Submission Portal](#) as set forth in the agreement.

#### **COMMENTS**

Please provide any comments to clarify any information provided above.

#### **APPROVAL TO PROCEED**

\_\_\_\_\_  
Principal Investigator Signature

\_\_\_\_\_  
Dean/Dean Designee Signature

\_\_\_\_\_  
Department Chair Signature

#### **VERIFICATION**

\_\_\_\_\_  
Sponsored Projects Accounting Signature

\_\_\_\_\_  
Department of Contracts and Grants Signature *(not required for services agreements)*