

BUDGET EXPENDITURE APPROVAL (BEA)

PURPOSE

The Budget Expenditure Approval Form is a mechanism to ensure effective documentation of all budget approvals and adjustments including:

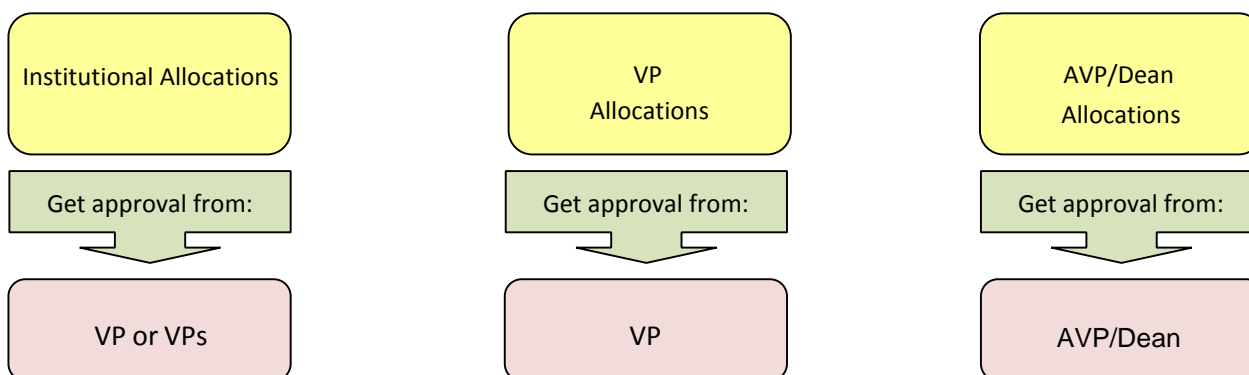
- ✓ Institutional allocations (Central funding)
- ✓ VP Allocations
- ✓ AVP/Dean Allocations

HOW TO USE

Fill out Parts A & B in the form below and obtain the necessary signatures for approval. Drop down boxes are provided where possible to minimize the need for data entry. A hard copy of the completed form must be signed by the approval authority, and sent via email to Finance Services at financeservices@ucalgary.ca. Once received, the budget adjustments will be input to reflect in the Faculty/Unit's budget envelope and Continuity Schedule. I.e. BEA information will be reflected in the quarterly budget adjusted budgets in line with the quarterly budget timelines.

Requirements to request BEA include:

- ✓ Funding commitment amount
- ✓ Source of funding (Faculty/Unit)
- ✓ Adjustment Period (Board, Q1, Q2, Q3, Q4)
- ✓ Term of funding (if one-time)
- ✓ Allocation type (base vs one-time)



Submit completed BEA form to financeservices@ucalgary.ca

BUDGET EXPENDITURE APPROVAL FORM

For Office Use Only

Date Entered:

BEA# _____

PART A – TRANSFER TO (Receiving Faculty/Unit)

Budget Year:	BEA Adjustment Period:
Allocation Type:	Fund:
Faculty/Unit:	
Project or Initiative Name:	
Description/Comments:	
Authorizing Name:	
Authorizing Signature:	Title:

PART B – TRANSFER FROM (Receiving Faculty/Unit)

Faculty/Unit:	Fund:
Funding Commitment \$:	
Term of Funding in Years (if One-Time)	Term End Date:
Funding by Year, if One-Time:	
Year 1	Year 2
Year 3	Year 4
Year 5	Year 6
Authorizing Name:	
Authorizing Signature:	Title:

BEA form completed by:

Date: