

Retro Cost Transfer Justification Form FAQs

Question: How many PTAOs can be credited and debited in a single form?

Answer: Only one PTAO can be credited but as many as needed can be debited (one “From” PTAO to multiple “To” PTAOs).

Question: How do I obtain the required approvals using the new online form?

Answer: There are fields in the online form to add the approvers UVA computing IDs, used for routing forms for approval. Note: Please do not add “@virignia.edu”, only the UVA computing ID portion is required. Once the form is submitted, the system sends an approval request email to each approver provided in the form.

Question: How do I provide my expenditure item details?

Answer: The second page of the form has an “upload attachment” button. Expenditure details need to be attached as PDF, Excel or JPG files. Please ensure that transactions totaling the transfer amounts in the form are clearly identified. There is no restriction to the number of attachments that can be uploaded.

Question: If I have multiple transfer dates which one should I use in the form?

Answer: Please enter the oldest transfer date in the form.

Question: Are there types of retro cost transfers that do not require the justification form to be filled out?

Answer: Yes, please see the scenarios below that do not require a justification form to be filled out:

- The transfer involves ONLY non-sponsored PTAOs
- You are clearing a deficit on a sponsored PTAO to a non-sponsored PTAO
- You are moving an unallowable or unallocable cost off a sponsored PTAO to a non-sponsored PTAO
- You are moving charges between projects (P) or tasks (T) on a single award (A)
- You are correcting an expenditure type to reflect supporting documentation

Question: What are my next steps after the form is approved?

Answer: Once the RCTJF has completed the approval process the requester will receive an approval email with an approval ID#. This approval ID# should be added in the notes field of the labor adjustment or to the comments field of the non-labor cost transfer in Oracle.

Question: I have a question not listed above who should I contact?

Answer: Please email any other questions to: osp-retro-request@virginia.edu

