**SBD Guidance for Category Transfer**

*Reminder:* ***Laws of 2024, 2nd Session, Chapter 69, Section 13 (C)*** *allows for transfers between categories: “In addition to specific category transfer authorized in Subsection E of this section and unless a conflicting category transfer is authorized in Subsection E of this section, all agencies, including legislative agencies, may request category transfers amount personal services and employee benefits, contractual services, and other.”*

*The following justification format must be used for each Category Transfer request. (Please note the General Appropriation Act defines these transfers as “category transfers.”) Any BAR that does not follow this format or does not contain complete documentation will be rejected. Please do not omit any section, subsection, or question on this form. If an item does not appear to be applicable, indicate this by placing an “n/a” under the item. Please submit all justification documentation in duplicate.*

***Please note: this section should be deleted and replaced with the agency letterhead.***

I. BAR IDENTIFICATION

BAR Type: Category Transfer

**SHARE Budget Journal I.D. Numbers:**

Initiating Agency:

Fund/Agency/Dept code:

Initiating Organization:

II. AGENCY CONTACT

Name:

Title:

Phone number:

III. LEGAL AUTHORITY

Identify the specific legal authority governing this BAR, such as the General Appropriation Act, special bill, or state statute.

* *For the citations of the General Appropriation Act, include the lowest level of authorization from the act (i.e., Laws 20XX, Section, Chapter XXX, Section XX, Subsection XX, Paragraph XX, Page XX).*
* *For separate specific legal authority, use the following citation: Section X-X-X NMSA 1978).*
* *If a special bill, please cite the law, chapter, section, subsection, and page number of the pertinent legislation.*
* *If the funding is federal, please cite Section 6-3-23(D) NMSA 1978 and also provide the Catalog of Federal Domestic Assistance (CFDA) number and the program title.*

*Please see the list on the SBD website of the most common sources of statutory authority for budget increases and adjustments.*

*Please remove this section before submitting.*

IV. BAR JUSTIFICATION

* 1. Purpose:
     + What action is being taken?
     + Why is this action necessary?
     + How will the action being taken improve program performance?
  2. Does this BAR support an increase in term FTE? If yes, how many and how will these FTE and the programmatic activities they are undertaking be funded in the long term?
  3. Is the action being taken in conflict with any limitation or does it support any requirement within the General Appropriation Act?
  4. What other sources of funds within existing appropriations could be used to cover this request?
  5. What are the programmatic effects of not implementing this BAR?

V. BAR DETAIL

This section must provide answers to the following detailed questions:

1. Justification

1. What previously anticipated expenditures are no longer necessary and why?

2. What anticipated expenditures are being increased and why?

B. If the transfer proposes an increase in capital outlay:

1. What are the specific types of items to be purchased?

1. If the items include computer equipment, where in your approved IT Plan do these item(s) appear?
2. How will these items improve agency operations or better assist in meeting your performance targets?
3. Funding Impacts:
4. Is the transfer recurring or non-recurring?
5. What are the future funding impacts of this adjustment?

VI. ATTACHMENTS

List attachments, if any.