New Department and Approver Change Form Instructions

New Department Request – Please complete Sections 1 through 4.
Change Approver – Please complete Section 4 and the chart string information in Section 5.
Change Department Title – Please complete the title in Section 1 and the chart string information in Section 5.

Section 1 – Purpose:

Please describe the purpose of the new department. An example might be:

This department will track all activities related to student orientation such as the printing and distributing of orientation material; the cost of advisors, student tour guides; refreshments for the students and their families; etc.

After the department activities are identified, please provide a suggested title for the department and the desired effective date.

Section 2 – Source of Funds:

Please check as many fund sources as you think will be used to support this activity. In some cases more than one Department ID may be issued to record the fiscal activity in accordance with Board of Regents’ fiscal procedures. If the source of the revenue is not listed, please check the “Other” box and describe the source. If you need assistance with the definition of the funds, please review the “Account/Fund Code” link on the Controller’s website.

Section 3 – Types of Expenditures Incurred:

Please indicate which type of expenditures will be charged to this budget. The estimated budget that is submitted on the Budget Amendment form with the Department Request form should include the account codes that will be used.

If the department will have salary charges it is very important to indicate that on the form. It may take up to two weeks for ADP to add the new department to the payroll tables. Until that occurs no one will be paid from this department.

Section 4 – Approver for Department:

Please indicate the fiscal manager for the department. This name will appear in the “Authorized Approver List” on the Controller’s website as well as in PeopleSoft. Additionally, please indicate if the department approver has attended Account Reconciliation and/or Budget Progress Report training. If not, the approver’s signature is agreeing to complete the training within three months of the department’s set-up date.

If someone else in the department will be reviewing travel expenses prior to the Department Approver, please complete the next line. This person will be added to the routing sequence in the PeopleSoft Expense Module.

All requests for new departments or changes need the approval of the divisional Vice President.

Section 5 – Department Chart String:

If you are requesting a change in approvers or department title only, please complete this section.

Routing: Please send the form with the amendment (if applicable) to the Controller’s Office for fund, class, and revenue account coding. Budget Services will assign the Department ID and program code. The chart string information will be returned to the Approver once the budget amendment is processed.