Department Request Form Instructions

This form is used to request a new Department ID, change the title of an existing department ID, or request a department ID be inactivated or reactivated. **If you only want to change the approver on an existing department, please use the Approver Change form located on both Budget Services and the Office of the Controller's websites.**

How do you wish to use this form?

Please enter initiators name, email, and check the box at the top of the form that applies to the action requested. If you are requesting a new/reactivated department you'll need to submit a budget amendment via CoreIntegrator showing where the budget authority will come from.

Section 1 – Purpose:

a. <u>Preferred Title:</u> Please provide a suggested title for the department. Department title must not exceed 30 characters.

b. <u>Department Information:</u> Please provide the purpose of the new department by describing the activities that will be funded. For example:

   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.

c. <u>Division Name:</u> Please provide division name.

d. <u>Effective Date:</u> Please select the date in which you would like this change or set up to go into effect.

e. <u>College Name:</u> Please provide college name.

f. <u>Source of Funds:</u> Please check the fund sources 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 and a separate Department Request Form may be required. If the source of the revenue is not listed, please check the "Other" box and describe the source.

g. <u>Title Change:</u> If you are requesting a change or set up in the title of the department, please provide the Department ID.

h. <u>Types of Expenditures Incurred:</u> Please indicate which type of expenditures will be charged to this budget. The estimated budget that is submitted on the Budget Amendment form <u>with</u> 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 2 – Department Approver:

    a. 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.

    b. Please indicate the fiscal manager email address.

    c. Please indicate the fiscal manager Employee ID and PeopleSoft User ID.

Section 3 – Additional Approvers:

The Travel, Expense, and ePro modules allow for two levels of on-line approvals. If you wish to activate an additional on- line approval level requiring someone else to review requests prior to the Department Manager, please include their names, PeopleSoft User IDs, and Employee ID numbers. They will be added to the routing sequence for approvals in the PeopleSoft Expense Module.

Section 4 – Divisional Vice President Approval

The approval of the divisional Vice President over the area where the department resides is required except for New Scholarship Request. Please provide Vice President's name and email address.