



STOCKTON UNIVERSITY

Fund/Org/Account/Program & Banner Finance Access Request Form

Directions: Please complete the form in its entirety. Completion/submission of this form does not constitute approval of a requested fund/org/account. Once a fund/org/account is created, it will exist forever, even if you do not use it.

Date of Request:

Type of Request: New Change Terminate

Select One: Fund, Organization, Account, or Program

FUND

Definition: Self-balancing set of accounts; shows ownership of cash/fund balance. Include the source, intended use, restrictions, and responsible person or entity in description.

ORGANIZATION

Definition: Budgetary or departmental unit. Include justification in description. New organizations require Budget approval. This will be done on your behalf.

ACCOUNT

Definition: Identifies type of account (asset, liability, revenue, labor, expense). Review the Account Code Search tool for an existing code that meets your needs prior to submitting a new account code request.

PROGRAM

Definition: Defines the function/purpose of a transaction.

If Account, select the type (Check all that apply):

Proposed Banner Title (Maximum of 35 characters)

Equipment PCard Revenue Other Banner Transactions
 Non-Salary Expense Salary Expense Fund Transfers

Description of Intended Use/Purpose for Request:	
If new fund, what are the revenue sources?	
Provide examples for what this will be used.	
Is the fund/org needed for a specific period of time?	

Banner Request Details

Requestor (First & Last Name) _____	E-mail Address _____	Department/College/Unit _____
Budget Unit Manager (First & Last Name) _____	E-mail Address _____	Signature _____

Banner Finance Access Approval for New Funds and/or Orgs

Select Type of Access Role

<u>Username</u>	<u>Approver</u>	<u>End User</u>	<u>Check if Query Access Only</u>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FUNDS/ORGS: Send completed forms to *budget@stockton.edu*.
ACCOUNTS/PROGRAMS: Send completed forms to *fiscalaffairs@stockton.edu*.

For Accounting/Budget Use Only:

FOAP: Fund: _____ Organization: _____ Account: _____ Program: _____

Fund/Org Assigned by: Signature: _____ Date: _____

For Controller Use Only:

Account Code	<input type="text"/>	Dept. Restriction?	<input type="text"/>	SAMS Code (Optional)	<input type="text"/>
Predecessor Code	<input type="text"/>	Established by (Name)	<input type="text"/>	Data Enterable (Y/N)	<input type="text"/>
Summary Code (Optional)	<input type="text"/>	Account Type	<input type="text"/>	Other	<input type="text"/>
Budget Only? (Y/N)	<input type="text"/>			Date Established	<input type="text"/>

Approvals and Data Entry (Authorized Use Only):

Budget (Budgeted Operating Funds, Orgs)	<input type="checkbox"/>	Signature: _____	Date: _____
Fiscal Affairs (Funds, Accounts, Programs)	<input type="checkbox"/>	Signature: _____	Date: _____
Grants (Restricted Funds)	<input type="checkbox"/>	Signature: _____	Date: _____
Senior Vice President for Administration & Finance and Chief Financial Officer	<input type="checkbox"/>	Signature: _____	Date: _____

Comments: _____ Approved Denied