

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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## Carbondale Campus End User Instructions

### FORM – Request New Budget Purpose or Unit / Change in Budget Purpose or Unit

**Use:** To request or discontinue a Budget Purpose Value or Unit, replace a Fiscal Officer or Unit officer, move a Budget Purpose to another Unit, change a Budget Purpose title, or change the name of an existing Unit.

**Access:** Access the form via the E-Forms web site (<http://www.eforms.siu.edu>), Adobe Reader 7.0 or higher must be installed on your computer.

Note: If “Request a New Budget Purpose” is selected no other type of request should be checked.

Note: Use the guide below to show which sections to complete for each type of request. For a more detailed explanation of each field go to the Instructions Section.

#### *Request a New Budget Purpose*

Select if requesting a new Budget Purpose.

Complete the following sections/fields:

##### Section 1

- Check “Request a New Budget Purpose”
- Date Submitted
- Prepared by
- Phone Number

##### Section 2

- Effective Date

##### Section 3

- Budget Purpose Title
- Describe in detail how new Budget Purpose will be funded
- Describe in detail how new Budget Purpose will be used

##### Section 4

- Fiscal Officer Name
- Phone Number
- Fiscal Officer Title
- Mail Code
- E-mail Address

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

## Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address

## Attestation Statement and Approval Signature Section

### *Discontinue a Budget Purpose*

Select if discontinuing a Budget Purpose.

Complete the following sections/fields:

#### Section 1

- Budget Purpose(BP)
- Check "Discontinue a Budget Purpose"
- Date Submitted
- Prepared by
- Phone Number

#### Section 2

- Discontinue Date

#### Section 3

- Budget Purpose Title

#### Section 4

- Fiscal Officer Name
- Phone Number
- Fiscal Officer Title
- Mail Code
- E-mail Address

#### Section 5

- Unit Value
- Unit Name

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

- Unit Officer Name
- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

### *Replace a Fiscal Officer*

Select if replacing a Fiscal Officer.

Complete the following sections/fields:

#### Section 1

- Budget Purpose (BP)
- Check "Replace a Fiscal Officer"
- Date Submitted
- Prepared by
- Phone Number

#### Section 2

- Effective Date
- Reason for Change

#### Section 3

- Budget Purpose Title

#### Section 4

- Fiscal Officer Name
- Phone Number
- Fiscal Officer Title
- Mail Code
- E-mail Address
- Name of Fiscal Officer to be replaced

#### Section 5

- Unit Value
- Unit Name
- Unit Officer Name

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

### *Change the Title of an Existing BP*

Select if changing the title of an existing Budget Purpose.

Complete the following sections/fields:

#### Section 1

- Budget Purpose (BP)
- Check "Change the Title of an Existing BP"
- Date Submitted
- Prepared by
- Phone Number

#### Section 2

- Effective Date
- Reason for Change

#### Section 3

- Budget Purpose Title
- New Budget Purpose Title

#### Section 4

- Fiscal Officer Name
- Phone Number
- Fiscal Officer Title
- Mail Code
- E-mail Address

#### Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- Phone Number

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

## *Move a BP to Another Unit*

Select if moving a Budget Purpose to another Unit.

### **IMPORANT NOTICE FROM HUMAN RESOURCES**

If salaries are being paid from the Budget Purpose to be moved, an excel spreadsheet in the format shown below must be forwarded to Accounting Services with the "Request New Budget Purpose or Unit / Change in Budget Purpose or Unit" form. Human Resources will use the spreadsheet to change the assignment costing for the listed individuals from the old Unit value to the new Unit value. Assignment Costing forms will not be required.

Social Security Number	Employee Name	Organization	Budget Purpose Number	Old Unit Value	New Unit Value	Effective Date for Change
123-45-0000	John Doe	Accounting Services	272888	23304	26001	04/01/02
000-32-5555	Mary Hancock	Accounting Services	272888	23304	26001	04/01/02

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

## **IMPORANT NOTICE FROM HUMAN RESOURCES**

**If wages are being paid from the Budget Purpose to be moved, an excel spreadsheet in the format shown below must be forwarded to Accounting Services with the “Request New Budget Purpose or Unit / Change in Budget Purpose or Unit” form. Human Resources will use the spreadsheet to change the assignment costing for the listed individuals from the old Unit value to the new Unit value. Assignment Costing forms will not be required.**

<b>Employee Name</b>	<b>Department</b>	<b>Job Classification</b>	<b>Budget Purpose Number</b>	<b>Old Unit Value</b>	<b>New Unit Value</b>
John Doe	Accounting Services	Clerical and Office Related	272888	23304	26001
Mary Hancock	Accounting Services	Clerical and Office Related	272888	23304	26001

Complete the following sections/fields:

Section 1

- Budget Purpose (BP)
- Check “Move a BP to Another Unit
- Date Submitted
- Prepared by
- Phone Number

Section 2

- Effective Date
- Reason for Change

Section 3

- Budget Purpose Title

Section 4

- Fiscal Officer Name
- Phone Number
- Fiscal Officer Title
- Mail Code
- E-mail Address

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

## Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address
- New Unit Value
- New Unit Name
- New Unit Officer Name
- Phone Number
- New Unit Officer Title
- Mail Code
- E-mail Address

## Attestation Statement and Approval Signature Section

### *Request a New Unit*

Select if requesting a new Unit.

Complete the following sections/fields:

#### Section 1

- Check "Request a New Unit"
- Date Submitted
- Prepared by
- Phone Number

#### Section2

- Effective Date
- Reason for Change

#### Section 3 (Skip)

#### Section 4 (Skip)

#### Section 5

- New Unit Name

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- New Unit Officer Name
- Phone Number
- New Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

### *Discontinue a Unit*

Select if discontinuing a Unit.

Complete the following sections/fields:

#### Section 1

- Check "Discontinue a Unit"
- Date Submitted
- Prepared by
- Phone Number

#### Section 2

- Effective Date
- Reason for Change

#### Section 3 (Skip)

#### Section 4 (Skip)

#### Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

### *Replace a Unit Officer*

Select if replacing a Unit Officer.



# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

Complete the following sections/fields:

## Section 1

- Check “Replace a Unit Officer”
- Date Submitted
- Prepared by
- Phone Number

## Section 2

- Effective Date
- Reason for Change

## Section 3 (Skip)

## Section 4 (Skip)

## Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- New Unit Officer Name
- Phone Number
- New Unit Officer Title
- Mail Code
- E-mail Address

Attestation Statement and Approval Signature Section

### *Change the Name of an Existing Unit*

Select if changing the name of an existing Unit.

Complete the following sections/fields:

## Section 1

- Check “Change the Name of an Existing Unit”
- Date Submitted
- Prepared by
- Phone Number

## Section 2

- Effective Date

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- Reason for Change

Section 3 (Skip)

Section 4 (Skip)

Section 5

- Unit Value
- Unit Name
- Unit Officer Name
- Phone Number
- Unit Officer Title
- Mail Code
- E-mail Address
- New Unit Name

Attestation Statement and Approval Signature Section

## **Instructions:**

Complete the form using the following instructions:

Section 1: This section is to be used to enter the Budget Purpose and Preparers information. It will also be used to select the general purpose of the request.

*Budget Purpose (BP)* Enter the Budget Purpose value affected by this request. If the request is for a new Budget Purpose Value, Replace A Unit Officer, Request A New unit, or Discontinue A Unit leave this field blank. Otherwise it is required for all other options.

*Date Received by Accounting Services*  
For Accounting Services use only. Leave blank.

*Request a New Budget Purpose*  
Select if requesting a new Budget Purpose.

*Discontinue a Budget Purpose*  
Select if discontinuing a new Budget Purpose.

*Replace a Fiscal Officer* Select if replacing a Fiscal Officer.

*Change the Title of an Existing BP*

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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Select if changing the title of an existing Budget Purpose.

## *Move a BP to Another Unit*

Select if moving a Budget Purpose to another Unit.

*Request a New Unit* Select if requesting a new Unit.

*Discontinue a Unit* Select if discontinuing a Unit.

*Replace a Unit Officer* Select if replacing a Unit Officer.

## *Change the Name of an Existing Unit*

Select if changing the name of an existing Unit.

*Date Submitted* Indicate the date that the request is submitted. (Format: DD Mmm YYYY) (Required field)

*Prepared by* Indicate the preparers name (Required field).

*Phone Number* Indicate the preparers phone number (Required field).

Section 2: This section is to be used to enter the effective date, discontinue date, and reason for the requested change.

*Effective Date* Enter the effective date of the request. (Format: DD MmmYYYY).

*Discontinue Date* Enter the date the Budget Purpose or Unit is to be discontinued. Only use to discontinue a Budget Purpose or Unit. (Format: DD Mmm YYYY).

*Reason for Change* Provide a brief justification for the requested change.

Section 3: This section is to be used to enter the Budget Purpose Title, New Budget Purpose Title, as well as the New Budget Purpose's use and funding information.

*Budget Purpose Title* Enter the title of the Budget Purpose. Do not use abbreviations.

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

## *New Budget Purpose Title*

Enter the proposed Budget Purpose title. Do not use abbreviations.

## *Describe in detail how new Budget Purpose will be funded*

Provide a detailed description of all revenue sources for this Budget Purpose and the anticipated annual revenue for each source. If funding will be coming from another department or an existing Budget Purpose within your department, please indicate the Budget Purpose Value or Values that will provide the funding. If there is insufficient space, enter "See Attached". Attach a memo signed by the Fiscal Officer describing the funding sources in detail. You may include the information for this item and the next item (Describe in detail how new Budget Purpose will be used) in one memo.

## *Describe in detail how new Budget Purpose will be used*

Provide a detailed description of the types of expenditures this account may incur and any other information that will give us an understanding of its function and intended purpose. If there is insufficient space, enter "See Attached". Attach a memo signed by the Fiscal Officer explaining how the Budget Purpose will be used. You may include the information for this item and the information requested for the previous item (Describe in detail how new Budget Purpose will be funded) in one memo.

Section 4: This section is used to list the Fiscal Officer general information.

## *Fiscal Officer Name*

Enter the name of the Fiscal Officer responsible for the Budget Purpose listed above. If "Replace a Fiscal Officer" was selected in Section 1 enter the name of the new Fiscal Officer responsible for the Budget Purpose. (Maximum size of this field in AIS is 50 characters)

## *Phone Number*

Enter the phone number of the Fiscal Officer listed in the "Fiscal Officer Name" field.

## *Fiscal Officer Title*

Enter the title of the Fiscal Officer listed in the "Fiscal Officer Name" field.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

*Mail Code* Enter the mail code for the Fiscal Officer listed in the "Fiscal Officer Name" field.

*E-mail Address* Enter the E-mail address of the Fiscal Officer listed in the "Fiscal Officer Name" field.

*Name of Fiscal Officer to be replaced*

Enter the name of the Fiscal Officer being replaced.

Section 5: This section is used to enter general information regarding the Unit.

*Unit Value* Enter the Unit Value of the University department.

*Unit Name* Enter the Name of the Unit listed above in the "Unit Value" field.

*Unit Officer Name* Enter the Name of the Unit Officer who is responsible for the Unit listed above in the "Unit Value" field.

*Phone Number* Enter the phone number of the Unit Officer listed in the "Unit Officer Name" field above.

*Unit Officer Title* Enter the title of the Unit Officer listed in the "Unit Officer Name" field above.

*Mail Code* Enter the mail code of the Unit Officer listed in the "Unit Officer Name" field above.

*E-mail Address* Enter the E-mail address of the Unit Officer listed in the "Unit Officer Name" field above.

*New Unit Value* Enter the new Unit Value of the University department to which the Budget Purpose(s) will be moved. If a new Unit is being created leave this field blank.

*New Unit Name* Enter the name of the University Department. If you chose "Move a BP to Another Unit" in Section 1, enter the name of the University Department that corresponds to the new Unit Value listed in the "New Unit Value" field above.

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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*New Unit Officer Name*

Enter the name of the Unit Officer who will be responsible for the Unit Value listed in the "Unit Value" field above. If "Move a BP to Another Unit" is checked in Section 1, enter the name of the Unit Officer who will be responsible for the new Unit Value listed in the "New Unit Value" field above.

*Phone Number*

Enter the phone number for the Unit Officer listed in the "New Unit Officer Name" field above.

*New Unit Officer Title*

Enter the title of the Unit Officer listed in the "New Unit Officer Name" field above.

*Mail Code*

Enter the mail code for the Unit Officer listed in the "New Unit Officer Name" field above.

*E-mail Address*

Enter the E-mail address for the Unit Officer listed in the "New Unit Officer Name" field above.

*Budget Purpose Value* This field is automatically populated with the value entered in Section 1 "Budget Purpose (BP)".

*Date Submitted*

Enter the current date (Format: DD Mmm YYYY).

## **Administrative Approvals:**

Note: This form has been designed to allow an individual to always sign on a line corresponding with his or her reporting level regardless of the purpose of the form (i.e., the Dean/Director will always sign on the line for Dean/Director, the Vice Chancellor will always sign on the line for Vice Chancellor, the Chancellor will always sign on the line for Chancellor, etc.).

The person signing the form should choose the specific 'Signature Line' corresponding with his or her reporting level; and check the appropriate box, if applicable, located to the right of the 'Signature Line' to indicate Fiscal Officer or Unit Officer. The following scenarios are presented as guidance for choosing the correct 'Signature Line.'

# Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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## Request a New Budget Purpose

Obtain the required signatures on page two of the form. The reporting level of the Fiscal Officer determines the signatures needed to complete the form. The signatures required to request a new Budget Purpose are the Fiscal Officer and each higher reporting level as follows:

- Signature of the Fiscal Officer.
- Signature of the Unit Officer.
- Signature of the Dean or Director (if applicable).
- Signature of the Vice Chancellor.
- Signature of the Chancellor (if the Vice Chancellor or a member of the Vice Chancellor's staff is the Fiscal Officer).
- Signature of the President (if the Chancellor or a member of the Chancellor's staff is the Fiscal Officer).

1. If the Fiscal Officer reports to a Unit Officer, the required signatures are:

- **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
- **Signature of Unit Officer:** Signature of the Unit Officer.
- **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

2. If the Unit Officer is the Fiscal Officer, the required signatures are:

- **Signature of Unit Officer:** Signature of the Unit Officer.
- Check the box for "Fiscal Officer" immediately to the right of Signature of Unit Officer to indicate the Unit Officer is the Fiscal Officer.
- **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

3. If a staff member of the Dean/Director's Office is the Fiscal Officer, the required signatures are:

- **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
- **Signature of Dean/Director:** Signature of the Dean or Director.
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

4. If the Dean or Director is the Fiscal Officer, the required signatures are:

- **Signature of Dean/Director:** Signature of the Dean or Director.
- Check the box for "Fiscal Officer" immediately to the right of Signature of Dean/Director to indicate the Dean or Director is the Fiscal Officer.
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

5. If a staff member of the Vice Chancellor's Office is the Fiscal Officer, the required signatures are:

- **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

- **Signature of Chancellor:** Signature of the Chancellor.
6. If the Vice Chancellor is the Fiscal Officer, the required signatures are:
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of Vice Chancellor to indicate the Vice Chancellor is the Fiscal Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.
  7. If a staff member of the Chancellor’s Office is the Fiscal Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.
    - **Signature of President:** Signature of the President.
  8. If the Chancellor is the Fiscal Officer, the required signatures are:
    - **Signature of Chancellor:** Signature of the Chancellor.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of Chancellor to indicate the Chancellor is the Fiscal Officer.
    - **Signature of President:** Signature of the President.
  9. If a staff member of the President’s Office is the Fiscal Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of President:** Signature of the President.
  10. If the President is the Fiscal Officer, the required signatures are:
    - **Signature of President:** Signature of the President.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of President to indicate the President is the Fiscal Officer.

### Discontinue a Budget Purpose

Obtain the required Fiscal Officer signature on page two of the form. The reporting level of the Fiscal Officer determines the signature line to be completed on the form. Again, the only signature required to discontinue an inactive Budget Purpose is that of the Fiscal Officer.

1. If the Fiscal Officer reports to a Unit Officer, the required signature is:
  - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
2. If the Unit Officer is the Fiscal Officer, the required signature is:
  - **Signature of Unit Officer:** Signature of the Unit Officer.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Unit Officer to indicate the Unit Officer is the Fiscal Officer.
3. If the Dean or Director is the Fiscal Officer, the required signature is:



## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

- **Signature of Dean/Director:** Signature of the Dean or Director.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Dean/Director to indicate the Dean or Director is the Fiscal Officer.
4. If the Vice Chancellor is the Fiscal Officer, the required signature is:
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of Vice Chancellor to indicate the Vice Chancellor is the Fiscal Officer.
  5. If the Chancellor is the Fiscal Officer, the required signature is:
    - **Signature of Chancellor:** Signature of the Chancellor.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of Chancellor to indicate the Chancellor is the Fiscal Officer.
  6. If the President is the Fiscal Officer, the required signature is:
    - **Signature of President:** Signature of the President.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of President to indicate the President is the Fiscal Officer.

### Replace a Fiscal Officer

Obtain the required signatures on page two of the form. The reporting levels of the previous and new Fiscal Officers determine the signatures needed to complete the form. The signatures required to request the replacement of the Fiscal Officer are the Fiscal Officer and each higher reporting level are as follows:

- Signature of the **new** Fiscal Officer.
  - Signature of the **previous** Fiscal Officer.
  - Signature of the person in the next higher reporting level.
1. If the new Fiscal Officer reports to a Unit Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the new Fiscal Officer.
    - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.
    - **Signature of Unit Officer:** Signature of the Unit Officer.
  2. If the Unit Officer is the new Fiscal Officer, the required signatures are:
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - Check the box for “Fiscal Officer” immediately to the right of Signature of Unit Officer to indicate the Unit Officer is the Fiscal Officer.
    - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

3. If the Dean or Director is the Fiscal Officer, the required signatures are:
  - **Signature of Dean/Director:** Signature of the Dean or Director.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Dean/Director to indicate the Dean or Director is the Fiscal Officer.
  - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor
4. If the Vice Chancellor is the Fiscal Officer, the required signatures are:
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Vice Chancellor to indicate the Vice Chancellor is the Fiscal Officer.
  - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.
  - **Signature of Chancellor:** Signature of the Chancellor
5. If the Chancellor is the Fiscal Officer, the required signatures are:
  - **Signature of Chancellor:** Signature of the Chancellor.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Chancellor to indicate the Chancellor is the Fiscal Officer.
  - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.
  - **Signature of President:** Signature of the President
6. If the President is the Fiscal Officer, the required signatures are:
  - **Signature of President:** Signature of the President.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of President to indicate the President is the Fiscal Officer.
  - **Signature of Previous Fiscal Officer:** Signature of the previous Fiscal Officer. If the previous Fiscal Officer is no longer with the University, please enter “Not Available” in this field.

### Change the Title of an Existing BP

Obtain the required signatures on page two of the form. The reporting level of the Fiscal Officer determines the signatures needed to complete the form. The signatures required to change the title of an existing Budget Purpose are the Fiscal Officer and each higher reporting level as follows:

- Signature of the Fiscal Officer.
- Signature of the Unit Officer.
- Signature of the Dean or Director (if applicable).
- Signature of the Vice Chancellor.
- Signature of the Chancellor (if the Vice Chancellor or a member of the Vice Chancellor's staff is the Fiscal Officer).

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

- Signature of the President (if the Chancellor or a member of the Chancellor's staff is the Fiscal Officer).
1. If the Fiscal Officer reports to a Unit Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  2. If the Unit Officer is the Fiscal Officer, the required signatures are:
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - Check the box for "Fiscal Officer" immediately to the right of Signature of Unit Officer to indicate the Unit Officer is the Fiscal Officer.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  3. If a staff member of the Dean/Director's Office is the Fiscal Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of Dean/Director:** Signature of the Dean or Director.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  4. If the Dean or Director is the Fiscal Officer, the required signatures are:
    - **Signature of Dean/Director:** Signature of the Dean or Director.
    - Check the box for "Fiscal Officer" immediately to the right of Signature of Dean/Director to indicate the Dean or Director is the Fiscal Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  5. If a staff member of the Vice Chancellor's Office is the Fiscal Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - **Signature of Chancellor:** Signature of the Chancellor.
  6. If the Vice Chancellor is the Fiscal Officer, the required signatures are:
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - Check the box for "Fiscal Officer" immediately to the right of Signature of Vice Chancellor to indicate the Vice Chancellor is the Fiscal Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.
  7. If a staff member of the Chancellor's Office is the Fiscal Officer, the required signatures are:
    - **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- **Signature of President:** Signature of the President.
8. If the Chancellor is the Fiscal Officer, the required signatures are:
- **Signature of Chancellor:** Signature of the Chancellor.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Chancellor to indicate the Chancellor is the Fiscal Officer.
  - **Signature of President:** Signature of the President.
9. If a staff member of the President’s Office is the Fiscal Officer, the required signatures are:
- **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
  - **Signature of President:** Signature of the President.
10. If the President is the Fiscal Officer, the required signatures are:
- **Signature of President:** Signature of the President.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of President to indicate the President is the Fiscal Officer.

### Move a BP to Another Unit

Obtain the required signatures on page two of the form. The reporting level of the Fiscal Officer determines the signatures needed to complete the form. The signatures required to move an existing BP to another Unit are the Fiscal Officer and each higher reporting level as follows:

- Signature of the Fiscal Officer.
  - Signature of the Unit Officer.
  - Signature of the Dean or Director (if applicable).
  - Signature of the Vice Chancellor.
  - Signature of the **new** Unit Officer.
  - Signature of the **new** Dean or Director if the BP is moving to a Unit in a different Dean/Director Area (if applicable).
  - Signature of the **new** Vice Chancellor if the BP is moving to a Unit in a different Vice Chancellor Area.
1. If the Fiscal Officer reports to a Unit Officer, the required signatures are:
- **Signature of Fiscal Officer:** Signature of the Fiscal Officer.
  - The previous Unit Officer should sign on Signature of Previous Unit Officer, 9, or 10 depending on his or her reporting level and check the adjacent Unit Officer box if applicable. The Previous Unit Officer should sign on:
    - **Signature of Previous Unit Officer** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor.
    - **Signature of Previous Dean/Director and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

---

- **Signature of Fiscal Officer<sup>0</sup> and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Vice Chancellor.
  - **Signature of Unit Officer:** Signature of the **New** Unit Officer.
  - **Signature of Dean/Director:** Signature of the Dean or Director if the old and new Units report to the same Dean/Director Area. Otherwise, the **new** Dean or Director must sign on **Signature of Dean/Director** and the **previous** Dean or Director must sign on **Signature of Previous Dean/Director**. (if applicable).
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor if the old and new Units report to the same Vice Chancellor Area. Otherwise, the **new** Vice Chancellor must sign on **Signature of Vice Chancellor** and the **previous** Vice Chancellor must sign on **Signature of Fiscal Officer<sup>0</sup>**.
2. If the Unit Officer is the Fiscal Officer, the required signatures are:
- **Signature of Previous Unit Officer:** Signature of the Previous Unit Officer.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Previous Unit Officer to indicate the Previous Unit Officer is the Fiscal Officer.
  - **Signature of Dean/Director:** Signature of the Dean or Director if the old and new Units report to the same Dean/Director Area. Otherwise, the **new** Dean or Director must sign on **Signature of Dean/Director** and the **previous** Dean or Director must sign on **Signature of Previous Dean/Director**. (if applicable).
  - **Signature of Unit Officer:** Signature of the **New** Unit Officer.
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor if the old and new Units report to the same Vice Chancellor Area. Otherwise, the **new** Vice Chancellor must sign on **Signature of Vice Chancellor** and the **previous** Vice Chancellor must sign on **Signature of Fiscal Officer<sup>0</sup>**.
3. If the Dean or Director is the Fiscal Officer, the required signatures are:
- **Signature of Previous Dean/Director:** Signature of the **Previous** Dean or Director (if applicable).
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Previous Dean/Director to indicate the Previous Dean or Director is the Fiscal Officer.
  - **Signature of Unit Officer:** Signature of the **New** Unit Officer.
  - **Signature of Dean/Director:** Signature of the **New** Dean or Director (if applicable).
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor if the old and new Units report to the same Vice Chancellor Area. Otherwise, the **new** Vice Chancellor must sign on **Signature of Vice Chancellor** and the **previous** Vice Chancellor must sign on **Signature of Fiscal Officer<sup>0</sup>**.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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4. If the Previous Vice Chancellor is the Fiscal Officer, the required signatures are:
  - **Signature of Fiscal Officer0:** Signature of the **Previous** Vice Chancellor.
  - Check the box for “Fiscal Officer” immediately to the right of Signature of Fiscal Officer0 to indicate the Previous Vice Chancellor is the Fiscal Officer.
  - **Signature of Unit Officer:** Signature of the **New** Unit Officer.
  - **Signature of Dean/Director:** Signature of the **New** Dean or Director (if applicable).
  - **Signature of Vice Chancellor:** Signature of the **New** Vice Chancellor.

### Request a new Unit

Obtain the required signatures on page two of the form. The reporting level of the Unit Officer determines the signatures needed to complete the form. The signatures required to request a new Unit are the Unit Officer and each higher reporting level as follows:

- Signature of the Unit Officer.
  - Signature of the Dean or Director (if applicable).
  - Signature of the Vice Chancellor.
  - Signature of the Chancellor (if the Vice Chancellor or a member of the Vice Chancellor’s staff is the Unit Officer).
  - Signature of the President (if the Chancellor or a member of the Chancellor’s staff is the Unit Officer).
1. If the Unit Officer reports to a Dean/Director or in the absence of a Dean/Director position the Unit Officer reports to the Vice Chancellor, the required signatures are:
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  2. If the Unit Officer is the Dean or Director, the required signatures are:
    - **Signature of Dean/Director:** Signature of the Dean or Director.
    - Check the box for “Unit Officer” located to the right of Signature of Dean/Director to identify the Dean or Director as the Unit Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  3. If a staff member of the Vice Chancellor’s office is the Unit Officer, the required signatures are:
    - **Signature of Vice Chancellor:** Signature of the Unit Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- **Signature of Chancellor:** Signature of the Chancellor.
4. If the Unit Officer is the Vice Chancellor, the required signatures are:
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - Check the box for “Unit Officer” located to the right of Signature of Vice Chancellor to identify the Vice Chancellor as the Unit Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.

### Discontinue a Unit

Obtain the required signatures on page two of the form. The reporting level of the Unit Officer determines the signatures needed to complete the form. The signatures required to discontinue a Unit are the Unit Officer and each higher reporting level as follows:

- Signature of the Unit Officer.
  - Signature of the Dean or Director (if applicable).
  - Signature of the Vice Chancellor.
  - Signature of the Chancellor (if the Vice Chancellor or a member of the Vice Chancellor’s staff is the Unit Officer).
  - Signature of the President (if the Chancellor or a member of the Chancellor’s staff is the Unit Officer).
1. If the Unit Officer reports to a Dean/Director or in the absence of a Dean/Director position the Unit Officer reports to the Vice Chancellor, the required signatures are:
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  2. If the Unit Officer is the Dean or Director, the required signatures are:
    - **Signature of Dean/Director:** Signature of the Dean or Director.
    - Check the box for “Unit Officer” located to the right of Signature of Dean/Director to identify the Dean or Director as the Unit Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  3. If a staff member of the Vice Chancellor’s office is the Unit Officer, the required signatures are:
    - **Signature of Unit Officer:** Signature of the Unit Officer.
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - **Signature of Chancellor:** Signature of the Chancellor.
  4. If the Unit Officer is the Vice Chancellor, the required signatures are:
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - Check the box for “Unit Officer” located to the right of Signature of Vice Chancellor to identify the Vice Chancellor as the Unit Officer.
    - **Signature of Chancellor:** Signature of the Chancellor.

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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5. If the Unit Officer is the Chancellor, the required signatures are:
  - **Signature of Chancellor:** Signature of the Chancellor.
  - Check the box for “Unit Officer” located to the right of Signature of Chancellor to identify the Chancellor as the Unit Officer.
  - **Signature of President:** Signature of the President.
6. If the Unit Officer is the President, the required signatures are:
  - **Signature of President:** Signature of the President.
  - Check the box for “Unit Officer” located to the right of Signature of President to identify the President as the Unit Officer.

### Replace an Existing Unit Officer

Obtain the required signatures on page two of the form. The reporting levels of the new and previous Unit Officers determine the signatures needed to complete the form. The signatures required to replace an existing Unit Officer are as follows:

- Signature of the **new** Unit Officer.
  - Signature of the **previous** Unit Officer.
  - Signature of the person in the next higher reporting level.
1. If the **new** Unit Officer reports to a Dean/Director or in the absence of a Dean/Director position the **new** Unit Officer reports to the Vice Chancellor, the required signatures are:
    - **Signature of Unit Officer:** Signature of the **New** Unit Officer.
    - The previous Unit Officer should sign on Signature of Previous Unit Officer, 9, or 10 depending on his or her reporting level and check the adjacent Unit Officer box if applicable. The previous Unit Officer should sign on:
      - **Signature of Previous Unit Officer** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor.
    - **Signature of Previous Dean/Director and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director.
    - **Signature of Fiscal Officer<sup>0</sup> and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Vice Chancellor.
    - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
    - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
    - If the Vice Chancellor is the previous Unit Officer, then the Signature of the Chancellor is required on **Signature of Chancellor**.
  2. If the **new** Unit Officer is the Dean or Director, the required signatures are:



## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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- **Signature of Dean/Director:** Signature of the Dean or Director.
  - Check the box for “Unit Officer” located to the right of Signature of Dean/Director to identify the Dean or Director as the Unit Officer.
  - The previous Unit Officer should sign on:
    - **Signature of Previous Unit Officer** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor; or,
    - **Signature of Previous Dean/Director and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director; or,
    - **Signature of Fiscal Officer<sup>0</sup> and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Vice Chancellor.
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  - If the Vice Chancellor is the previous Unit Officer, then the Signature of the Chancellor is required on **Signature of Chancellor**.
3. If the **new** Unit Officer is the Vice Chancellor, the required signatures are:
- **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  - Check the box for “Unit Officer” located to the right of Signature of Vice Chancellor to identify the Vice Chancellor as the Unit Officer.
  - The previous Unit Officer should sign on:
    - **Signature of Previous Unit Officer** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor.
    - **Signature of Previous Dean/Director and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director.
  - **Signature of Chancellor:** Signature of the Chancellor.

### Change the Name of an Existing Unit

Obtain the required signatures on page two of the form. The reporting levels of the Unit Officer determine the signatures needed to complete the form. The signatures required to change the name of an existing Unit are as follows:

- Signature of the Unit Officer.
- Signature of the Dean or Director (if applicable).
- Signature of the Vice Chancellor.
- Signature of the Chancellor (if the Vice Chancellor or a member of the Vice Chancellor’s staff is the Unit Officer).
- Signature of the President (if the Chancellor or a member of the Chancellor’s staff is the Unit Officer).

## Request New Budget Purpose Or Unit / Change In Budget Purpose Or Unit

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2. If the Unit Officer reports to a Dean/Director or in the absence of a Dean/Director position the Unit Officer reports to the Vice Chancellor, the required signatures are:
  - **Signature of Unit Officer:** Signature of the Unit Officer.
  - **Signature of Dean/Director:** Signature of the Dean or Director (if applicable).
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
3. If the Unit Officer is the Dean or Director, the required signatures are:
  - **Signature of Dean/Director:** Signature of the Dean or Director.
  - Check the box for “Unit Officer” located to the right of Signature of Dean/Director to identify the Dean or Director as the Unit Officer.
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
4. If a staff member of the Vice Chancellor’s Office is the Unit Officer, the required signatures are:
  - **Signature of Unit Officer:** Signature of the Unit Officer.
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  - **Signature of Chancellor:** Signature of the Chancellor.
5. If the Unit Officer is the Vice Chancellor, the required signatures are:
  - **Signature of Vice Chancellor:** Signature of the Vice Chancellor.
  - Check the box for “Unit Officer” located to the right of Signature of Vice Chancellor to identify the Vice Chancellor as the Unit Officer.
  - **Signature of Chancellor:** Signature of the Chancellor.

**If your reporting line does not match one of the scenarios above or if you are unsure as to the Signature requirements, please contact the Accounting Services Office at 536-2351.**

**Routing:**

Print all pages of the form, obtain required signatures listed on page 2, and mail completed form to: Sandy Partridge, Accounting Services, MC 6812.