

INSTRUCTIONS FOR COMPLETION OF *REQUEST FOR NEW DESIGNATED BUDGET FORM*

- 1. Fund Type:** Check the appropriate designated fund type. See “*How to set up a new designated budget*” for a description of designated fund types. (Document available on the Controller’s Office web page: <http://www.usm.edu/controllersoffice>)
- 2. Location:** Check the appropriate box for the location of your department.
- 3. Requesting Department:** List the name of the department that is requesting the new budget. For example: Center for Community Health, or Biological Sciences
- 4. Department Number (DeptID):** This is the 6-digit chartfield that corresponds with the requesting department. For example: 350010 is for Biological Sciences.
- 5. Name to Assign to Budget:** Fill in the name for the new budget. For example, for a Development budget, the name could be “Biological Sciences Development.” If the budget is for fees for a specific test, the name could be “Biological Sciences Aptitude Test Fees.”
- 6. Responsible Department:** Applicable only when the department that this budget is linked to is different than the department requesting the new budget. For example, if the University Budget Office requests a new development fund budget for the Biological Science department, the University Budget Office would be listed as requesting department and Biological Sciences would be listed as responsible department.
- 7. USM Box Number:** Indicate the box number on campus that should be associated with this budget. This is for all mail and any applicable payroll information.
- 8. Effective Beginning Date of Establishment:** This is the date that the request should go into effect. For example, if the request is completed October 15, but the budget should not be used until January 1, the Effective Date should be January 1.
- 9. Effective Ending Date (For Projects Only):** This is the date that the fund should be closed. However, if you leave this information blank it will default to three years from the effective beginning date or the date received in the Controller’s Office.
- 10. State the purpose for having this designated fund. Why will it exist? What will it accomplish? Clearly describe its primary purpose & objectives. :** State the purpose and goal of the new designated fund.
- 11. Is this activity being performed now through another budget, or is this a new activity of the department? Please explain. :** If this is not a new activity, explain currently which budget the activity is going through and why it should be moved. If this is a new activity, explain the purpose of having a separate designated fund.
- 12. Identify sources of expected revenue. :** Explain where the funding dollars will come from.
- 13. Total Annual Budget (Estimated):** The total annual budget that you expect to receive from other university budgets and/or outside revenue sources.
- 14. Approved Signature Authority and Co-Signature Authorities:** List individuals with authority to incur expenditures against the newly established budget.
- 15. Dean/Vice President/Provost Approval:** Signature approval must be given by your area’s Dean, Vice President or Provost.

RETURN FORM TO THE CONTROLLER’S OFFICE BOX 5143.