Request for Account Change or Discontinue Instructions

Use: To request account changes or discontinue account(s).
  - Fiscal Officer/Delegate changes including adding and/or removing delegates.


SPECIAL NOTES: Fiscal Officer Attestation Statements must be signed (not digitally) and on file in Admin Accounting for all Fiscal Officers/Delegates.

Complete the Request for AIS Access if a change in system access is needed.

Select the type of request:
  - Account Changes: Request to change account FO and/or Delegates
  - Discontinue Account(s): Request closure of account(s)
  - Date: Date request initiated
  - Department/Unit Name: Select from the dropdown list
  - Budget Purpose #/Description Section: List up to 10 Budget Purpose #s to be updated or closed.
  (A separate sheet can be attached if additional BP’s need to be updated.)

UPDATE FISCAL OFFICER: Complete to Change Fiscal Officer

Fiscal Officer Name/Title: Name and title of new fiscal officer

Fiscal Officer Information: Provide basic information about fiscal officer:
  Phone # Campus Box E-ID

Fiscal Officer Signature: Required

ADD DELEGATE: Complete to Add new Fiscal Officer Delegates

NOTE: If the requested Budget Purpose will have more than two delegates, list multiple on the Name line or attach a list of Delegates. (e.g., John Doe/Jane Smith/Bill Jones).

Delegate Name/Title: Name and title of delegate(s)

Delegate Information: Provide basic information about the delegate(s)
  Phone # Campus Box E-ID

Delegate Signature: Required

REMOVE DELEGATE(S) Complete to remove Fiscal Officer Delegates

NOTE: If the requested Budget Purpose will have more than three delegates to be removed, list multiple on the Name line or attach a list of Delegates. (e.g., John Doe/Jane Smith/Bill Jones).

Delegate Name(s) & E-ID(s): Name(s) and E-ID(s) of Delegate(s) to remove

Dean/Director and VC Approval: Signature of Dean/Director and VC approving account changes.

Clicking on Submit Form: Will send this form to Pat Rausch (prausch@siue.edu)