

Edwardsville Campus End User Instructions
FORM - Request for Account Creation or Account Changes

Use: 1) To request a new account, discontinue an account or change an account title.
2) To add or change fiscal officer, delegate, or unit officer.

Access: Access the form via the AIS web site, Electronic Forms, Edwardsville campus location. FormFlow Filler software must be installed on your computer to allow you to access the form. If you do not have FormFlow Filler software, download it from the AIS web page (select Software Downloads, FormFlow Filler).

Instructions: Complete the form using the following instructions: (Complete the sections that apply to the type of request above. Unless noted, all fields are REQUIRED.)

SPECIAL NOTE:

- **A Fiscal Officer Attestation Statement must be signed and on file for all Fiscal Officers/Delegates.**
- **Please also complete a Request for AIS Access if a change in system access is needed.**

Type of Request: Indicate the type of request:

- **New Account:** Request new account
- **Discontinue Account:** Request discontinuance of account
- **All Other Changes:** Request any other change

Date: Date request initiated (defaults to current date).

Budget Purpose #: Budget Purpose account number

Information required for change or discontinues account:

- **Budget Purpose Title:** Title/description of account
- **Budget Purpose Number:** Budget Purpose account number
- **Change Fiscal officer/delegate** Budget Purpose number and description

Budget Purpose Information Section: Complete this section when requesting a new budget purpose or changing the title of a budget purpose value; or when adding, changing or deleting a unit/fiscal officer or delegate.

Budget Purpose Title: Provide requested title for the Budget Purpose

If Change, Old Title: If title change, provide old title

Account Purpose (Choose 1):

Academic Support	Instruction	Public Services
Operations/Maintenance	Institutional Support	Student Services
Scholarships/Fellowships	Auxiliary Enterprises	Research

Detailed Purpose of Account: How account will be used (new account request only)

How Account Will Be Funded: State what types of resources will support this account (New account request only)

Department /Unit Name: Department and/or department's unit name

Fiscal Officer Name: Name of account's fiscal officer, plus signature

Fiscal Officer Title: Title of account's fiscal officer

Fiscal Officer Information: Provide basic information about fiscal officer:

- Mail code/Campus Box
- Phone #
- E-mail

If Replacement, Name of Fiscal Officer to be replaced:

If fiscal officer change, provide the name of the fiscal officer being replaced

Fiscal Officer Delegate: Name of account's delegate, plus signature
 If the requested Budget Purpose will have more than one delegate, list all on the Fiscal Officer Delegate line or attach a list of Delegates. (e.g., John Doe/Jane Smith/Bill Jones).

Fiscal Officer Delegate Title: Title of fiscal officer delegate

Delegate Information: Provide basic information about the delegate/s

- Mail code/Campus Box
- Phone #
- E-mail

If Replacement, Name of Delegate to be replaced:

If delegate change, provide the name of the delegate being replaced

Unit Officer Name or Designee: Name of account's unit officer, plus signature – (Only needed when changing Unit Officer. This is rarely done).

Unit Officer Title: Title of unit officer

Unit Officer Information: Provide basic information about unit officer:

- Mail code/Campus Box
- Phone #
- E-mail

If Replacement, Name of Unit Officer to be replaced:

If unit officer change, provide the name of the unit officer being replaced

Dean/Director Approval: Signature of Dean/Director approving account or change

Vice Chancellor Approval: Signature of Vice Chancellor or designee approving account or change

Special Note:

- If new values are assigned, the requester will be notified. A copy of the Account Creation or Account Changes form will be mailed to the requester.

Routing: Print this form, obtain all necessary signatures, and mail to:
Pat Rausch, Administrative Accounting, Box 1002.