

General Information

All Requests for New Account or Account Change forms must be properly initiated and approved by the SIU Foundation before fiscal activity can commence.

1. Check the type of request that is being made at the top of the page.
2. Enter the account title and number.
3. Check the appropriate fund type.
4. Enter the effective date of the new account or account change.
5. If additional information is needed to complete this form, please call the SIU Foundation Carbondale Office at (618) 453-4900 or SIU Foundation Springfield Office at (217) 782-2955.

New Account Requests

1. Choose an Account Category from the drop down box:
 - Program Activities - Restricted for use the division/department.
 - Faculty and Staff - Faculty and staff salaries and employment benefits.
 - Research - Scientific, technical, and humanistic investigations (excluding clinical trials).
 - Public Service & Ext - Support of activities established primarily to provide non-instructional services to people and groups within or outside the institution.
 - Physical Plant/Plant Operations/Maintenance - Building and grounds, other facilities and equipment.
 - Student Financial Aid - Financial Aid for undergrad students and graduate students.
 - Other Restricted - Not classified in other categories
2. Enter the account purpose and account restrictions (if applicable). It is necessary to describe the purpose and restrictions in sufficient detail so the proposed account may be properly classified within the accounting structure of the Foundation. Examples of the account purpose could be: conduct research in a specific or general area; purchase of supplies, materials and services in support of a specific activity; etc. Specific descriptions of the activity of the proposed account are necessary so that the appropriate administrative authorities will be able to determine that the establishment of the proposed account is consistent with objectives of the department, school, college or division and the University. This information will also be the basis for review of the account by both the internal and external auditors. Since the space that is provided on this form is limited, please attach additional sheets as necessary to provide adequate detail. Any additional correspondence that may be germane to the implementation of this account should be attached.
3. Enter the College/Division and Department that will benefit from the new account.
4. Enter the budget officer contact information.

Purpose/Restriction Change

1. Enter the new Account Purpose and Restrictions (if applicable).
2. Enter the Reason for proposed change.

Account Title Change

1. Enter the old account title under Proposed change.
2. Enter the Reason for proposed change.

Discontinued Account

Signature and Approvals

Signatures required - Delegates cannot sign.

- | | | |
|---|---|--|
| <input type="checkbox"/> New Account Request | <input type="checkbox"/> Purpose/Restriction Change | <input type="checkbox"/> College/Department Change |
| <input type="checkbox"/> Discontinued Account | <input type="checkbox"/> Account Title Change | |

General Information

Account Title:		Account Number:
<input type="checkbox"/> Expendable Fund (Current)	<input type="checkbox"/> Endowment Fund (Must have MOA and AP. Check with CDO.)	<input type="checkbox"/> Other Fund
Account Category:		
Account Purpose and Restrictions:		
College / Division:	Department:	
Proposed change (if applicable):		
Reason for proposed change:		Effective Date:

Budget Officer Contact Information

Name (Last, First, MI):	
Title:	Department:
Mail Code:	Email Address:

Authorizations and Approvals

_____	Date	_____	Date
Budget Officer		Treasurer, SIU Foundation	
_____	Date		
Dean / Division Head			

DO NOT WRITE BELOW THIS LINE

<input type="checkbox"/> Compliance	<input type="checkbox"/> Review	<input type="checkbox"/> IFAS / Advance	Entered by:	Date:
Donor / Contact ID:			Email:	