

INSTRUCTIONS FUND CREATION REQUEST FORM

- **Type of Transaction** - Indicate (by checking the box) the purpose of this form. Note: In the case of a master data element change, complete only the fund data that is changing, the fund number, date, and affix the proper signatures.
- **Source of funds** - Indicate (by checking the box) the source of the funds for the fund being created.
- **Name of Fund** - Enter a 20 character short title for the fund.
- **Description** - Enter up to 40 characters for the description of the fund.
- **Research Priority Area** - Enter a research priority area from the drop down menu. This field is only required if the fund meets the research categories as outlined in values on the field search menu.
- **Business Area** - An organizational unit that requires audited financial statements for external use. Often this corresponds to a separate operational or responsibility area in the organization. Enter the Business Area or select from the drop down menu if business area is unknown.
- **Discipline (CIP code)** - Enter the CIP code assigned by the area Budget Office or use the drop down menu to select the assigned code from the list. Sponsored Projects Accounting will check this field after the fund is created.
- **Department** – Enter the five digit department number designating the academic or support unit.
- **Cancer Research Match** – Enter a research match code from the drop down menu. Leave blank if this field is not relevant for the fund being created.
- **Contact Person** – Enter the name of the department head.
- **Responsible Person** – Enter the name of the appropriate Budget Officer. Enter the last name and first name separated by a space but with no punctuation.

Example: Doe John

- **Functional Area** - Four digit code supplied by the area Budget Office and used in FI to define the academic or support programs represented by this fund. Enter a functional area from the drop down menu.
- **List Fund Groups to be Updated** - Indicate if this needs to be added to a specific fund group.
- **Required Explanation** – Descriptive information regarding the purpose and type of fund requested (deferred, income, clearing, etc.).
- **Approval Signatures** - Obtain the necessary approval signatures as follows:
 1. Signature of the person completing the form
 2. Signature of College/Division Business Officer
 3. Signature of Area Budget Officer