



North Carolina A&T University Foundation Banner Finance Fund Create Form

Date:

Failure to attach supporting documentation will delay the processing of this form
User must have active Banner Finance profile to gain access to fund

Requester: Name _____
 Department _____
 Approvals *Print* _____ *Print* _____
Signature _____ *Signature* _____
 Department Head Dean or Vice Chancellor

Name of Fund: _____

Responsible Person: _____
Name Banner ID Number

Additional Authorized User Access:
 Data Entry Inquiry Only _____
 Name Banner ID Number

Additional Authorized User Access:
 Data Entry Inquiry Only _____
 Name Banner ID Number

Banner Organization _____

How will the funds be used: *(Please attach supporting documentation)*

Source of Funding	<input type="checkbox"/> Individual	<input type="checkbox"/> Fixed Contract	<input type="checkbox"/> Federal	<input type="checkbox"/> State Appropriations
	<input type="checkbox"/> Corporation	<input type="checkbox"/> Residual	<input type="checkbox"/> State	<input type="checkbox"/> Federal Appropriations
	<input type="checkbox"/> Foundation	<input type="checkbox"/> State Matching	<input type="checkbox"/> Local	
	<input type="checkbox"/> Fundraisers	<input type="checkbox"/> Other (Explain)		

For Business and Finance Use Only

Fund Code	<input type="text"/>	Grant Code	<input type="text"/>
Organization Code	<input type="text"/>	Accountant	<input type="text"/>
Account Code (for deposit)	<input type="text"/>	Final Report Date	<input type="text"/>
Program Code	<input type="text"/>		

Accountant: Name _____ Date _____
Approved by: Name _____ Date _____
Created by: Name _____ Date _____

Instructions for completing the Banner Finance Fund Request Form

Category

Description

Form Name	Fund Request Form
Form Source	Contracts & Grants, Budget, General Accounting, Campus Community
Form Purpose	To provide necessary information and authorization for a new fund to be created
Form Usage	Used by anyone who needs a new fund created Used to define the functions and types of activities the fund will have Used to assign new fund codes Used to serve as record of what was requested and approved
Field Title	Field Description
From: Name	Enter the name of the person requesting the new fund
Form: Department	Enter the requestor's department
Approvals: Dept Head	This requires the signature of the Department Head
Dean or VC	This requires the signature of the Dean or Vice Chancellor
Name of Fund	Enter the title of the fund
Responsible Person	Enter the person who is financially responsible for the fund
Responsible Person ID	Enter the responsible person's Banner ID Must use Banner generated ID number
Banner Organization	Enter the responsible person's organization
How are the funds used	This area should be used to describe in detail the purpose of this fund. Define why there is a need for this fund and what functions it will perform
Period	Enter the begin and end dates of the fund

*****Note** User must have an active Banner Finance Profile to be allowed access to the requested fund(s)

For Business and Finance Use Only

Fund Code	Enter Fund Code
Organization Code	Enter Organization Code
Program Code	Enter Program Code
Grant Code	Enter Grant Code
Accountant	Enter Accountant's Name
Final Report Date	Enter date the final report is due