New or Change To Existing Account Procedures

Account Creation: The decision to establish a new account must be made at the highest possible administrative level. The four most important considerations are:

1. The purpose of the account
2. The funding source for the account
3. Department assignment (President's Office, AA, BA, SS)
4. Whether there is a current account that can be used for the purpose

Changes of account title or deletion of an account must be coordinated through the office of the Vice President for Business Affairs.

Adding/Deleting/Changing an Account: The account manager may delegate account signature responsibility. To delegate or change account signature authorization, change an account name, or add/delete an account, an Account Addition/Change Request Form should be obtained from the Controller's Office web page and completed indicating the change that needs to be made. For mass changes, a spreadsheet attached to a signed Account Addition/Change Request Form or a spreadsheet attached to an email from the account manager can be used.