BUDGET OFFICE
Illinois State University

BUDGET OFFICER APPOINTMENT FORM INSTRUCTIONS

The Budget Officer Appointment Form is used to establish or change the Budget Officer on an account(s). Once the form is submitted, it routes to the employee's supervisor for approval and to the Comptroller's Office for processing. Appointments for Delegate(s) to act on behalf of the Budget Officer may also be requested via this form.

SELECT THE TYPE OF REQUEST

Select the option button to indicate the type of Budget Officer Appointment request to submit:
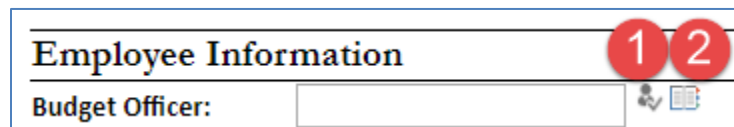
- New - Request a new Budget Officer for an account(s)
- Replace Existing - Replace an existing Budget Officer on an account(s) with a different staff member
- Modify Existing - Modify the account(s) to which an existing Budget Officer is assigned
- Delegate Only Changes – add, modify or delete a Delegate's access

FORM COMPLETION AND SUBMISSION FOR EACH TYPE OF REQUEST

New, Replace Existing, Modify Existing Budget Officer

EMPLOYEE INFORMATION

Budget Officer: Type name of employee to be the Budget Officer (Last name, First name) or use one of the "lookups" as follows…

1. Enter the employee's name as **Last name, First name**, or

2. Enter the employee's ULID and click the [icon] icon, or

3. Click on the [icon] icon and do the following:
   - Type the employee's last name in the "Find" field and click "Enter"
   - Select the appropriate employee from the list returned
   - Click "OK"
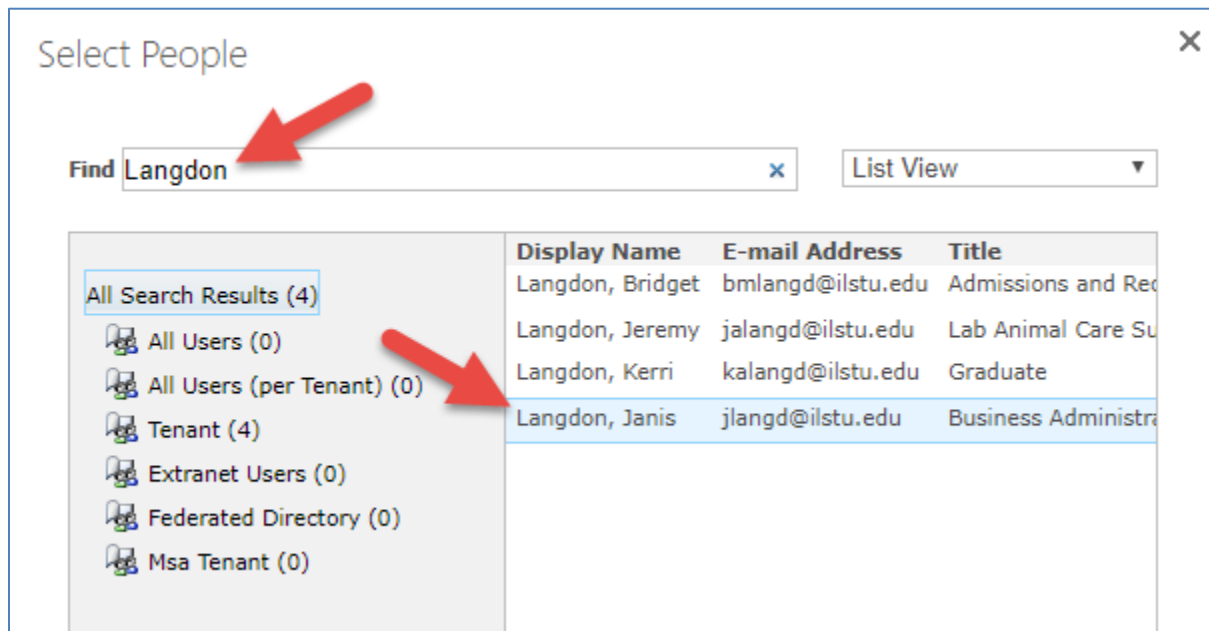
UID: Enter the employee's UID (9 digits, starting with "8")

Datatel Person ID: This can be found in Datatel using the VENI (Vendor Activity Inquiry) form. Search for the employee's name. This is the "ID" number (i.e. 0012345)

Effective Date – Enter the date that the employee's Budget Officer Appointment should be effective. The current date will automatically populate this field but if a different effective date is needed follow the instructions below.

Eff Date: 2/18/2019

- o Click on the calendar icon
- o Select the date the employee's access should be effective

Previous Budget Officer (available for Replace Existing Budget Officer only): Enter the name of the Budget Officer that will be replaced.

Select appropriate option button for the action being requested.
- New Budget Officer (not applicable to this type of request)
- Replace Existing Budget Officer selections:
   - o Assign all accounts of former Budget Officer
   - o Assign only the following accounts of former Budget Officer
   - o Assign all accounts of former Budget Officer except these accounts
- Modify Existing Budget Officer selections:
   - o Remove all accounts from Budget Officer
   - o Remove the following accounts from the Budget Officer
   - o Assign the following accounts to the Budget Officer

Employee Information

Budget Officer:		UID:	800000000

Datatel Person ID:		Eff Date:	9/28/2020

Add Delegates? ☐

Add Delegates: To assign Delegate(s) to act on the Budget Officer's behalf, select the checkbox. This opens the Delegate Information section where up to two Delegates may be added.

See Delegate Information Section below for further instructions.

ACCOUNT INFORMATION

Enter the Fund(s) and (Units) for which the Budget Officer will be responsible.

Account Information

Fund(s):	Unit(s):

DELEGATE INFORMATION

Delegates will be assigned to the funds/units listed in the Account Information section, to act on the Budget Officer's behalf. Complete "Delegate Only Changes" for different fund/unit assignment.

Delegate: Type name of employee to be the Delegate (Last name, First name) or use one of the "lookups" as previously described.

Start Date/End Date: Select start and end dates to indicate the time frame that the Delegate will have access to act on behalf of the Budget Officer. The End Date may be left blank for Delegate assignments that are continuous.

Delegate Information

Delegate: [_____] Start Date: [_____] End Date: [_____]

Delegate: [_____] Start Date: [_____] End Date: [_____]

Delegates listed will be assigned to the funds/units listed above to act on the Budget Officer's behalf. Complete "Delegate Only Changes" for different fund/unit assignment.

ADDITIONAL INFORMATION

Description of Change (required): Provide a brief description of the intended results of this Budget Officer Appointment (and Delegate, if applicable) request.

Additional Information

Description of Change: [_____] *

☐ Check this box to request Budget Center Access for this Budget Officer.

Budget Center Access: Select "Check this box to request Budget Center Access…" to open the additional fields described below.

BUDGET CENTER ACCESS INFORMATION

Requesting Budget Center Access in this form takes the place of submitting a separate "Budget Center Access Request" form. Budget Center Access for Delegates should be requested separately by using the Budget Center Access Request form.

Access Type – select Operating, Personnel or Both

Is Budget Transfer Functionality Needed? – No (default) or select Operating, Personnel or Both

What access is needed? – List the Funds, Folder, Accounts, or Unit Ranges that the person should have access to in Budget Center. Be descriptive about what the employee will be doing within Budget Center.

Budget Center Access Information for Budget Officer

This request replaces a separate Budget Center Access Request submission.

Access Type: [▾]

Is Budget Transfer Functionality Needed? [No ▾]

What access is needed? [   ]

Examples include Funds, Folders, Accounts, Units, or Unit Ranges. Please be descriptive about what the employee will be doing within Budget Center. If revoking access, leave blank.

AUTHORIZATION

Budget Officer's Supervisor: Type the name of the employee's supervisor in the field (Last name, First name) or use the lookups previously described.

Once the form has been completed, check the "I certify that I am authorized…" box and click the "Submit" button. This will submit the form for further approval by the employee's supervisor.

Once approval has been submitted, the Comptroller's Office will process the request.

The original submitter will receive an email to indicate that the request has been completed.

Authorization

Budget Officer's Supervisor: [   ]

☐ I certify that I am authorized to make this request for a Budget Officer Appointment.

Delegate Only Changes

This type of request is used to add a Delegate to act on behalf of a Budget Officer for the following reasons:

- Not all fund(s)/unit(s) of the Budget Officer will be assigned to the Delegate
- To make changes to Delegate assignment when no changes to Budget Officer appointment are needed

Delegate: Type the name of the person (Last name, First name), or use one of the "lookups" described previously.

Start Date/End Date: Select start and end dates to indicate the time frame that the Delegate will have access to act on behalf of the Budget Officer. The End Date may be left blank for Delegate assignments that are continuous.

Budget Officer: Enter the name of the Budget Officer (Last name, First name) on whose behalf the Delegate will act.

Select appropriate option button for the action being requested.

- Assign all accounts of Budget Officer of Delegate
- Assign only the following account(s) of the Budget Officer to Delegate
- Assign all accounts of Budget Officer to Delegate except these accounts
- Remove all accounts of Delegate
- Remove only the following accounts from the Delegate

ACCOUNT INFORMATION

Add the funds/units as needed for the request.

Account Information

Fund(s):	Unit(s):

ADDITIONAL INFORMATION

Description of Change (required): Provide a brief description of the intended results of this Delegate Only Change request.

Additional Information

Description of Change:

☐ Check this box to request Budget Center Access for this Delegate.

Delegate Budget Center Access request: "Check this box to request Budget Center Access for this Delegate." Complete the additional fields to indicate the access the Delegate will need in Budget Center. This will replace a separate Budget Center Access request submission.

AUTHORIZATION

Once the form has been completed, check the "I certify that I am authorized…" box and click the "Submit" button. This will submit the form for approval by the Budget Officer listed. The Delegate's supervisor will provide approval for Budget Center Access requested.

REQUIRED EDITS AFTER SUBMISSION

If the employee's supervisor, the Budget Officer (Delegate Only request) or Comptroller's Office determines that the request cannot be processed as submitted, they will "reject" the submission. Comments regarding the necessary edits can be provided by the supervisor, Budget Officer or Comptroller's Office and will be included in the "audit trail" at the bottom of the form. The request is sent back to the original submitter for correction/re-submission or cancellation.

The original submitter will receive a system-generated email indicating the request has been rejected. Using the link in the email, open the My Budget Office Forms Dashboard. The rejected request will be listed in the "Pending My Approval" section. Click the "edit" symbol for that request to re-open the form.

To re-submit:
- Enter necessary edits.
- Re-submit the request by once again selecting "I certify that I have the authority…" and click the "Submit" button.
- The request is then sent for supervisor approval and once approval has been provided will be forwarded to the Comptroller's Office for processing.

To cancel:
- If the request is no longer needed, you may cancel it by selecting "This request can be cancelled…" and click the "Submit" button. The request will no longer be processed.

SUPERVISOR (OR BUDGET OFFICER) APPROVAL

Once the request has been completed and submitted by the original submitter, approval by the employee's supervisor or Budget Officer (Delegate Only request) is required.
- The supervisor/Budget Officer receives a system-generated email indicating a request has been submitted for their approval.
- Click the "My Budget Office Forms Dashboard" link in the email. The request will be listed under the "Pending My Approval" section. Click the "edit" symbol to open the form for review.
- Review the submitted request.

  o If edits are required, click the "This request cannot be approved as presented." checkbox. An explanation may be entered in the box provided. This information will be viewable by all who have access to the form. Click "Submit".

A system-generated email will be sent to the original submitter of the request. They will open the form and enter the necessary edits and then re-submit the form for approval.

- o To approve the Budget Officer request as it's been submitted, click the "I certify that I am authorized to approve..." checkbox. Click "Submit".

The Comptroller's Office will receive a system-generated email indicating the Budget Officer Appointment or Delegate request is approved and may be processed.

When all approvals have been entered, the Comptroller's Office will complete the Budget Officer Appointment or Delegate request. Once finished, a system-generated email will be sent to the original submitter, Budget Officer, and Delegate(s) to communicate the completion of the request.

(If Budget Center Access has also been requested, the Budget Office will receive email notification that processing is needed.)

QUESTIONS/ASSISTANCE

If you need assistance or have questions about completing the Budget Officer Appointment Form please contact the University Budget Office via UniversityBudgetOffice@ilstu.edu or by phone at 438-2143.