

Colorado State University Pueblo
GRANT ACCOUNTS CREATE REQUEST

REQUESTED BY: _____ PHONE: _____

PURPOSE:

This form is required to establish an account on the Colorado State University – Pueblo Financial Reporting System. Please complete the form as indicated below and return with your fully executed Grant Award Notification or Contract as well as your approved budget to the Grant Accountant.

- 1) Project Title: _____
- 2) Organization Code: _____
- 3) Grant Expiration Date: _____
- 4) Higher Education Function Code: (ORSP will provide): _____
- 5) Fiscal Officer: _____
- 6) Account Supervisor: _____
- 7) Account Manager: _____
- 8) Account Expense: _____
- 9) Account Revenue: _____
- 10) Account Purpose: _____
- 11) Dept. F&A Distribution Acct#: _____

INSTRUCTIONS:

- 1) Enter suggested name for this account not to exceed twenty-five alpha-numeric characters.
- 2) Enter the **Organization Code**: This is the Department associated with the account. (i.e. P103)
[SEED ACCOUNTS are restricted to Org Code P103.]
- 3) The expiration date is the final date of the grant's performance period.
- 4) Enter the Higher Education Function Code.
[SEED ACCOUNTS are restricted to Higher Ed. Function Code RSAA]
- 5) Enter the name of the **Fiscal Officer**. This is the person that will have the authority to approve all Kuali documents created for this account.
- 6) Enter the **Account Supervisor**. The Account Supervisor provides oversight for account management at a higher level than the Account Manager but rarely receives any direct requests for action from Kuali. The Account Supervisor cannot be the same person as either the Fiscal Officer or the Account Manager.
- 7) Enter name of the **Account Manager**. The Account Manager has the responsibility for ensuring that funds are spent and managed according to the goals and objectives, and mission of the organization, to ensure that funds are being spent according to a budgeted plan and that the expenditures are appropriate to the function identified in the account. The account manager should not be the same person as the fiscal officer.
- 8) Give a short description of anticipated expenses (for example: salaries, and material supplies.)
- 9) Describe the Revenue for the account. [Please indicate the Funding Organization]
- 10) Indicate the purpose of the account (such as research, student services, academic support, instruction, or public service.)
- 11) Please provide your department's indirect cost return (F&A distribution) account. (If your department does not have one, please fill out another account create request to have one setup.)

FOR ACCOUNTING OFFICE USE ONLY

Account Number Assigned: _____

Funding Source Code: _____

Prepared and Entered By: _____

Date: _____