

NEW INDEX REQUEST FORM (Not to be used for contracts, grants, or service enterprises)

Name of Person Making Request _____ Phone # of Requestor _____
 Date of Request _____ Date Index to be Activated _____
 Name of Financial Manager/PI _____ Financial Manager/PI Banner ID _____
 Title for Index _____ Purpose of Index _____
 (Max 30 characters)
 College Code (CL code) _____ Research Center _____
 Department Code (DP code) _____ Unit Code (U code) _____
 (run Organization Hierarchy Report – <http://controller.usu.edu> - to get this #)
 Restrictions on Use of Funds _____ Restrictions Set by Whom _____

TYPE OF FUND (Source of Revenue) (Please select one)		TYPE OF PROGRAM (Purpose of Expenditures) (Please select one)	
_____ Tuition/Fees	_____ Sales/Services/Materials	___*_*_*_ Goods and/or services for USU Departments for a fee (Please call ext. 0589 for alternate form)	
_____ Federal Appropriations	_____ Conferences/Institutes	_____ Instruction	_____ Student Services
_____ State Appropriations	_____ Parking/Traffic	_____ Research	_____ Institutional Support
_____ Private Gifts/Grants	_____ Investment Earnings	_____ Public Service	_____ Operation/Maintenance
_____ Endowment Income	_____ Administrative Fees	_____ Service Departments	_____ Scholarships/Fellowships
_____ Indirect Cost Recovery		_____ Auxiliary Enterprises	_____ Academic Support
_____ Other (please specify) _____		_____ Other (please specify) _____	

(See page 2 for Type of Fund and Type of Program explanation)

1-Describe the general purpose and use of the index requested, 2- Describe the sources of revenue and the purpose of the index expenditures. 3- If revenue is from sales, describe product or services, customers, etc.

Complete this section only if requesting a new unit or the Financial Manager/PI is not already set up

Access to Index Granted to: Name _____ Banner User Name _____
 Name _____ Banner User Name _____
 Requisitions/Invoices: Level _____ Name _____ Banner ID _____
 Level _____ Name _____ Banner ID _____
 Level _____ Name _____ Banner ID _____
 Level _____ Name _____ Banner ID _____

Controller's Office Use: Manager of Finance Systems Approval _____

*****Both Signatures are required**

(For State Appropriated Funds & New Departments)

After obtaining signatures, submit to the Budget office if requesting State Appropriated Index Or if new dept is being established; otherwise, submit directly to the Controller's Office.

Department Head Signature & Date _____ **Budget Office Signature & Date** _____
Printed Name _____
Dean or Vice President Signature & Date _____ **Budget Office Signature & Date** _____
Printed Name _____

Controller's Office Use:

Accountant Name & Phone _____ Fund _____ Fund Type _____
 Program Code & Approval _____ Predecessor Fund _____
 Org _____ Index _____ (see title above) Sales Tax Code & Approval _____
 Predecessor Org (if new notify I.T.) _____ Org Title _____
 Director's Approval _____ Setup Date in Banner _____ Initials _____

TYPE OF FUND (Source of Revenue)

Tuition/Fees: assess against students for education purposes

Federal Appropriations: made available by federal legislative acts for current operations

State Appropriations: made available by state legislative acts for current operations

Private Gifts/Grants: from non-governmental organizations & Individuals for current operations

Endowment Income: from endowment funds or funds held by others under irrevocable trusts

Indirect Cost Recovery: from sponsored projects for purposes common to a number of activities

Sales/Services/Materials: from instruction, research, public services or auxiliary enterprise operation

Conferences/Institutes: registration fees for conferences & institutes

Parking/Traffic: fees assessed for parking or traffic management

TYPE OF PROGRAM (Purpose of Expenditures)

Goods and/or services for USU Departments for a fee (Please call ext. 0589 for alternate form)

Instruction: for all activities part of the instruction program

Research: for activities specifically organized to produce research outcomes

Public Service: for activities established to provide services to external groups

Auxiliary Enterprises: furnishes goods or services to students, faculty & staff for a fee

Student Services: for admissions, registrar & activities contributing to students' well-being

Institutional Support: for executive level management & planning

Operation/Maintenance: for operation & maintenance of facilities

Scholarships/Fellowships: in the form of grants, stipends, prizes & awards to students

Academic Support: to provide support services (library, media, deans, curriculum dev.)