

**INSTRUCTIONS FOR COMPLETING FORM
 “REQUEST NEW BUDGET PURPOSE OR UNIT / CHANGE IN BUDGET PURPOSE OR UNIT”**

I. Replace an Existing Unit Officer:

A. In **Section 1** of the “Request New Budget Purpose or Unit / Change in Budget Purpose or Unit” form complete the following fields:

- 1. Check box “Replace a Unit Officer”**
- 2. Date Submitted:** Enter the date the form will be submitted to Accounting Services. The format of this field is ‘DD Mmm YYYY’ where DD is day, Mmm is month, and YYYY is year. For example January 29, 2002 is entered as 29 Jan 2002.
- 3. Prepared by:** Enter the name of the individual preparing the form.
- 4. Phone No:** Enter the telephone number of the individual preparing the form.

B. In **Section 2** of the form complete the following required fields:

- 1. Effective Date:** Enter the calendar date as to when the change is to go into effect. The format of this field is ‘DD Mmm YYYY’ where DD is day, Mmm is month, and YYYY is year. For example July 1, 2002 is entered as 01 Jul 2002.
- 2. Reason for Change:** Provide a brief justification for replacing the Unit Officer. The three most frequently used justifications are “the current Unit Officer is retiring,” “the responsibilities of the current Unit Officer have changed,” and “the current Unit Officer is leaving (or has left) the University.”

**REQUEST NEW BUDGET PURPOSE OR UNIT/
 CHANGE IN BUDGET PURPOSE OR UNIT**
 SOUTHERN ILLINOIS UNIVERSITY

Section 1 (See "link" for detailed instructions)

Budget Purpose (BP): _____
 (Attach a listing for multiple Budget Purpose numbers)

Request a New Budget Purpose Request a New Unit
 Discontinue a Budget Purpose Discontinue a Unit
 Replace a Fiscal Officer Replace a Unit Officer
 Change the Title of an existing BP Change the Name of an existing Unit
 Move a BP to Another Unit

Date Received by Accounting Services: _____

Date Submitted: 27 Jul 2007
 Prepared by: SANDY PARTRIDGE
 Phone Number: 618-536-2616

Section 2

Effective Date: 27 Jul 2007 Discontinue Date: _____
 Reason for Change: Unit Officer left the university.

C. Skip Section 3.

D. Skip Section 4.

E. In **Section 5** of the form complete the following required fields:

- 1. Unit Value:** Enter the Unit Value of the University department.
- 2. Unit Name:** Enter the name of the University Department that corresponds to the Unit Value in Item VIII-E-1.

3. **Unit Officer Name:** Enter the name of the Unit Officer being replaced.
4. **New Unit Officer Name:** Enter the name of the **New** Unit Officer who will be responsible for the Unit Value in Item VIII-E-1.
5. **Phone Number:** Enter the office telephone number of the **New** Unit Officer named in Item VIII-E-4.
6. **New Unit Officer Title:** Enter the title of the **New** Unit Officer named in Item VIII-E-4.
7. **Mail Code:** Enter the campus mail code of the **New** Unit Officer named in Item VIII-E-4.
8. **E-mail Address:** Enter the e-mail address of the **New** Unit Officer named in Item VIII-E-4.

Section 5

Unit Value: 23720 Unit Name: ACCOUNTING SERVICES

Unit Officer Name: JUDITH MARSHALL Phone Number: _____

Unit Officer Title: _____ Mail Code: _____ Email Address: _____

New Unit Value: _____ New Unit Name: _____

New Unit Officer Name: LOREN COOK Phone Number: 618-536-2614

New Unit Officer Title: DIRECTOR Mail Code: 6812 Email Address: lcook@siu.edu

Callout boxes:

- Enter Unit Number. (points to Unit Value)
- Enter Unit Name. (points to Unit Name)
- Enter Unit Officer Name. (points to Unit Officer Name)
- Enter Phone Number and Email. (points to Phone Number and Email Address)
- Enter NEW Unit Office Name and Title. (points to New Unit Officer Name and Title)
- Enter Mail Code. (points to Mail Code)

- F. Obtain the required signatures on page two of the form. The reporting levels of the new and previous Unit Officers determine the signatures needed to complete the form. The signatures required to replace an existing Unit Officer are as follows:
1. Original Signature of the **new** Unit Officer.
 2. Original Signature of the **previous** Unit Officer.
 3. Original Signature of the person in the next higher reporting level.

The form has been designed to allow an individual to always sign on a line corresponding with his or her reporting level regardless of the purpose of the form (i.e., the Dean/Director will always sign on the line for Dean/Director, the Vice Chancellor will always sign on the line for Vice Chancellor, the Chancellor will always sign on the line for Chancellor, etc.).

Reporting level of Unit Officer determines the signatures needed to complete the form.

1.	Signature of Fiscal Officer	Date	<input type="checkbox"/> Fiscal Officer	
2.	Signature of Unit Officer	Date	<input type="checkbox"/> Fiscal Officer	<input type="checkbox"/> Unit Officer
3.	Signature of Dean/Director	Date	<input type="checkbox"/> Fiscal Officer	<input type="checkbox"/> Unit Officer
4.	Signature of Vice Chancellor	Date	<input type="checkbox"/> Fiscal Officer	<input type="checkbox"/> Unit Officer
5.	Signature of Chancellor	Date	<input type="checkbox"/> Fiscal Officer	<input type="checkbox"/> Unit Officer
6.	Signature of President	Date	<input type="checkbox"/> Fiscal Officer	<input type="checkbox"/> Unit Officer

If you hold multiple positions, only sign once and use the check boxes.

NOTE: The person signing the form should choose the specific ‘Signature Line’ corresponding with his or her reporting level; and check the appropriate box, if applicable, located to the

right of the ‘Signature Line’ to indicate Unit Officer. The following scenarios are presented as guidance for choosing the correct ‘Signature Line’.

1. If the **new** Unit Officer reports to a Dean/Director or in the absence of a Dean/Director position the **new** Unit Officer reports to the Vice Chancellor, the required signatures are:
 - a. **Signature Line 2:** Original signature of the **New** Unit Officer.
 - b. The previous Unit Officer should sign on Signature Line 8, 9, or 10 depending on his or her reporting level and check the adjacent Unit Officer box if applicable. The previous Unit Officer should sign on:
 - i. **Signature Line 8** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor.
 - ii. **Signature Line 9 and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director.
 - iii. **Signature Line 10 and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Vice Chancellor.
 - c. **Signature Line 3:** Original signature of the Dean or Director (if applicable).
 - d. **Signature Line 4:** Original signature of the Vice Chancellor.
 - e. If the Vice Chancellor is the previous Unit Officer, then the Original signature of the Chancellor is required on **Signature Line 5**.
2. If the **new** Unit Officer is the Dean or Director, the required signatures are:
 - a. **Signature Line 3:** Original signature of the Dean or Director.
 - b. Check the box for “Unit Officer” located to the right of Signature Line 3 to identify the Dean or Director as the Unit Officer.
 - c. The previous Unit Officer should sign on:
 - i. **Signature Line 8** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor; or,
 - ii. **Signature Line 9 and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director; or,
 - iii. **Signature Line 10 and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Vice Chancellor.
 - d. **Signature Line 4:** Original signature of the Vice Chancellor.
 - e. If the Vice Chancellor is the previous Unit Officer, then the Original signature of the Chancellor is required on **Signature Line 5**.
3. If the **new** Unit Officer is the Vice Chancellor, the required signatures are:
 - a. **Signature Line 4:** Original signature of the Vice Chancellor.
 - b. Check the box for “Unit Officer” located to the right of Signature Line 4 to identify the Vice Chancellor as the Unit Officer.
 - c. The previous Unit Officer should sign on:
 - i. **Signature Line 8** if the previous Unit Officer reports to the Dean/Director or in the absence of the Dean/Director position the previous Unit Officer reports to the Vice Chancellor.
 - ii. **Signature Line 9 and check the box “Unit Officer”** located to the right of this line if the previous Unit Officer is the Dean or Director.
 - d. **Signature Line 5:** Original signature of the Chancellor.

If your reporting line does not match one of the scenarios above or if you are unsure as to the Signature requirements, please contact Accounting Services at 536-2351.