

**INSTRUCTIONS FOR COMPLETING FORM
“TEMPORARY DELEGATION OF FISCAL OFFICER AUTHORITY FORM”**

- **Authorize Fiscal Officer Delegation** — Please follow the instructions in **Item I** entitled “Authorize Fiscal Officer Delegation.”

- **Revoke Fiscal Officer Delegation** — Please follow the instructions in **Item II** entitled “Revoke Fiscal Officer Delegation.”

**INSTRUCTIONS FOR COMPLETING FORM
TEMPORARY DELEGATION OF FISCAL OFFICER AUTHORITY**

I. Authorize Fiscal Officer Delegation:

- A.** In **Section 1** of the “Temporary Delegation of Fiscal Officer Authority” form complete the following fields:
- 1. Check box “Authorize Fiscal Officer Delegation”**
 - 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. This Authorizes:** Type or Print the names of the Temporary Fiscal Officer Delegate and the Fiscal Officer in the applicable fields.
 - Enter the Mail Code, E-mail Address, and office telephone number of the Temporary Fiscal Officer Delegate accordingly.
- C.** In **Section 3** of the form complete the following required fields:
- 1. Budget Purpose:** Enter the Budget Purpose value(s) and corresponding Budget Purpose Title(s) over which the Temporary Delegate will have fiscal officer delegation. If there are more than five Budget Purpose values for delegation to a single Delegate by one Fiscal Officer, enter “See Attached” on the first line in this section and attach a list of the Budget Purpose values with corresponding titles.
- For Grant accounts that reside in FAS, type the six-digit FAS ledger 6 account number in the ‘Budget Purpose’ field (6-2xxxx) and the FAS account title in the ‘Title’ field.
- NOTE:** If requesting delegation on New Budget Purpose requests or new FAS Grant Account requests, leave the Budget Purpose field blank and type the proposed Budget Purpose or FAS Grant Account title in the “Title” field. Complete the form and attach it to the back of the “Request New Budget Purpose or Unit / Change in Budget Purpose or Unit” form or the FAS “New Account Request/Change” form.
- D. Skip Section 4**
- E.** In **Section 5** have the Fiscal Officer and Temporary Fiscal Officer Delegate read this section and sign the form as follows:
- 1. On Signature Line 1:** The Temporary Fiscal Officer Delegate must sign the Fiscal Officer’s name in the first field, sign his or her name in the second field, and date the form.
 - 2. On Signature Line 2:** The Fiscal Officer must sign and date the form.

NOTE: Fiscal Officer Delegations are authorized in one-year increments expiring June 30th of each fiscal year. Accounting Services will send renewal notices in May to fiscal officers listing their Budget Purposes and corresponding current delegates. To renew the delegations, the fiscal officers will need to sign and return the letters to Accounting Services before June 30.

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II. Revoke Fiscal Officer Delegation:

- A.** In **Section 1** of the “Temporary Delegation of Fiscal Officer Authority” form complete the following fields:
- 1. Check box “Revoke Fiscal Officer Delegation”**
 - 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. This Authorizes:** Type or Print the names of the Temporary Fiscal Officer Delegate to be revoked and the current Fiscal Officer in the applicable fields.
- D.** In **Section 3** of the form complete the following required fields:
- 1. Budget Purpose:** Enter the Budget Purpose value(s) and corresponding Budget Purpose Title(s) over which temporary delegation will be revoked. If there are more than five Budget Purpose values for revocation for a single Delegate by one Fiscal Officer, enter “See Attached” on the first line in this section and attach a list of the Budget Purpose values with corresponding titles.

For Grant accounts that reside in FAS, type the six-digit FAS ledger 6 account number in the ‘Budget Purpose’ field (6-2xxxx) and the FAS account title in the ‘Title’ field.
- E.** In **Section 4** indicate the reason for revoking delegation. Examples are: the delegate has retired; the delegate has resigned; the delegate has transferred to another department; etc.
- F.** In **Section 5** on **Signature Line 2:** The Fiscal Officer must sign and date the form.