

# **BUDGET OFFICER/DELEGATE ACCESS REQUEST FORM INSTRUCTIONS**

The Budget Officer and Delegate Access Request form is used to request access to the Budget Center and/or establish or change the Budget Officer and delegate(s) on an account. Once the form is submitted, if it is a budget officer request, it routes to the budget officer's supervisor for approval and then to the Comptroller's Office for processing. If it is a delegate only request, it routes directly to the Comptroller's Office for processing. For questions regarding this form, contact the Comptroller's Office via email: [comptroller\\_colleague@ilstu.edu](mailto:comptroller_colleague@ilstu.edu).

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## FORM COMPLETION AND SUBMISSION



### Budget Officer Information

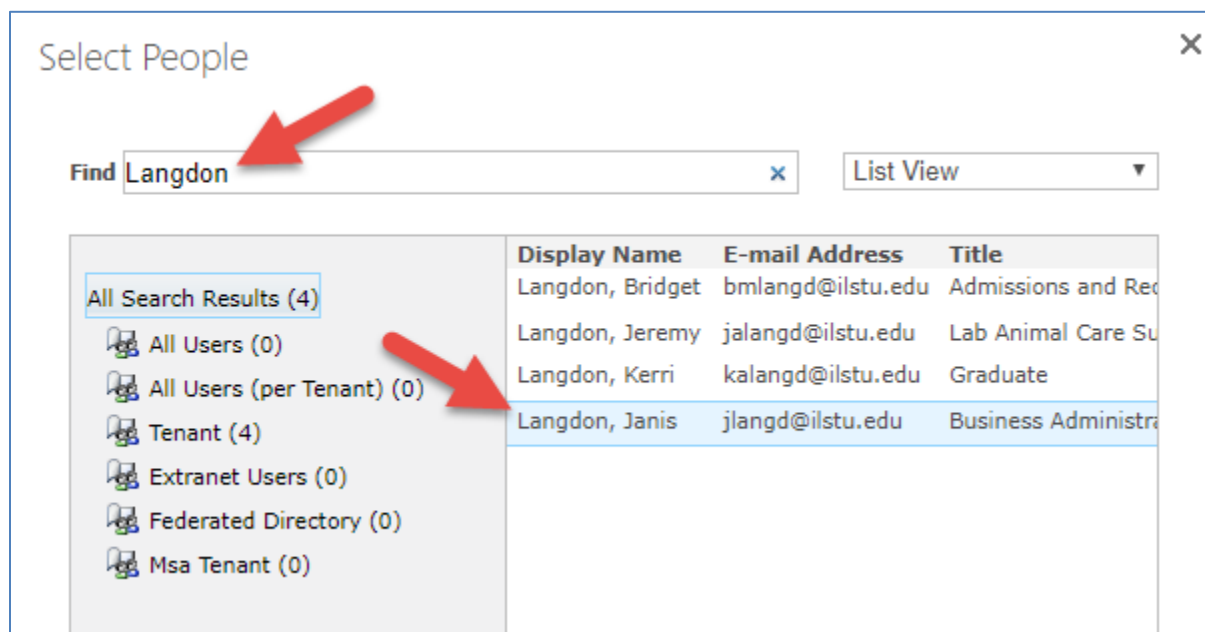
Budget Officer: Type name of the budget officer for which the update is being requested (Last name, First name) or use one of the “lookups” as follows...

### Budget Officer Information

**Budget Officer:**   **Effective Date:**  

**Department:**

1. Enter the employee's ULID and click the  icon, or
2. Click on the  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”



Display Name	E-mail Address	Title
Langdon, Bridget	bmlangd@ilstu.edu	Admissions and Rec
Langdon, Jeremy	jalangd@ilstu.edu	Lab Animal Care Su
Langdon, Kerri	kalandg@ilstu.edu	Graduate
Langdon, Janis	jlangd@ilstu.edu	Business Administr

3. Effective date: Enter the date that the change should take effect on.
4. Department: Enter the name/number of the budget officer's department.

Type of request: Select the radio button to indicate the type of change that's needed for the budget officer and/or delegate. The type of access request selected will trigger additional fields to open in the middle section of the form.

- New Budget Officer/Delegate – The employee does not currently have access to Colleague and/or Budget Center (new employee or employee that does not already have access), and they are not replacing an employee that had access to Colleague and/or Budget Center (see Replace Budget Officer/Delegate).
- Replace Budget Officer/Delegate – The employee is replacing another employee and needs the same access to Colleague and/or Budget Center and budget transfer authority. *This will also inactivate the replaced employee.*
- Modify Budget Officer/Delegate – The employee currently has access to Colleague and/or Budget Center, but changes to that access are needed.

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## Type of Request

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- |   |   |
|---|---|
| <input checked="" type="radio"/> New Budget Officer | <input checked="" type="radio"/> New Delegate |
| <input type="radio"/> Replace Budget Officer        | <input type="radio"/> Replace Delegate        |
| <input type="radio"/> Modify Budget Officer         | <input type="radio"/> Modify Delegate         |

*\*All Budget Officers are required to designate at least one Delegate*

Assign/update Budget Officer's accounts:

Is Budget Center Access needed for the Budget Officer? ☐

Assign/update Delegate's accounts:

Copy a previous employee's Budget Center Access? ☐

### New or Modify Budget Officer and/or Delegate

- Assign/update Budget Officer's accounts – select Assign all accounts, Assign only the following accounts, Assign all accounts except these accounts, Remove the following accounts, or Remove all accounts.
- Is Budget Center Access needed for the Budget Officer? – No (default) or check the box to indicate Yes.
- Assign/update Delegate's accounts – select Assign all accounts, Assign only the following accounts, Assign all accounts except these accounts, Remove the following accounts, or Remove all accounts.
- Copy a previous employee's Budget Center Access? – No (default) or check the box to indicate Yes.

Copy a previous employee's Budget Center Access? ☒

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## Copy Existing User Information

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*This will copy the accounts and access levels of the user listed. This does NOT remove access for the copied user.*

**Copy User:**  (Please include First name, Last name, and ULID)

**Effective Date:**  

### Copy Existing User Information

- Provide name of the employee (Last name, First name) whose Budget Center access (Funds, Folders, Unit Ranges) you would like this employee's access to "mirror".
- The Budget Office will set the employee's access to the same accounts and access levels of the user listed but does not remove access for the user whose access is mirrored.
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective.
  - Click on the calendar icon
  - Select the date the employee's access should be effective

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## Replace Existing Budget Officer

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*This will copy the accounts and access levels of the Budget Officer listed. This will also inactivate the replaced Budget Officer.*

**Replace Budget Officer:**  (Please include First name, Last name, and ULID)

**Effective Date:**  

### Replace Existing Budget Officer

- Provide the name of the employee (Last name, First name) who this employee will be replacing.
- The Budget Office will set the employee's access to the accounts and access levels of the user listed and will also inactivate the replaced user's access.
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective.
  - Click on the calendar icon
  - Select the date the employee's access should be effective

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## Replace Existing Delegate

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*This will copy the accounts and access levels of the Delegate listed. This will also inactivate the replaced Delegate.*

**Replace Delegate:**  (Please include First name, Last name, and ULID)

**Effective Date:**  

### Replace Existing Delegate

- Provide the name of the employee (Last name, First name) who this employee will be replacing.
- The Budget Office will set the employee's access to the accounts and access levels of the user listed and will also inactivate the replaced user's access.
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective.
  - Click on the calendar icon
  - Select the date the employee's access should be effective

Is Budget Center Access needed for the Budget Officer? ☒

#### Budget Officer Budget Center Access Information

- Access Type – select Operating, Personnel, Both or Revoke Access
- Is Budget Transfer Functionality Needed? – No (default) or select Operating, Personnel, Both, Revoke Access
- 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. If revoking access leave blank. The employee's access will be modified to what is listed.
- Effective Date – Enter the date that the employee's access to the Budget Center should be effective.
  - Click on the calendar icon
  - Select the date the employee's access should be effective

#### Delegate Type of Request Information

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### Delegate Information

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*The delegate(s) will be assigned to act on the Budget Officer's behalf for the account information indicated. A Delegate has **signature authority** to act on behalf of the Budget Officer. However, the named Budget Officer retains ultimate responsibility for the accuracy of financial information. A delegate cannot enter vouchers into Colleague for the accounts they are approving as a delegate.*

Is Budget Center Access needed for delegate(s)? ☒

Delegate(s):

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	
<input type="text"/>	

Access Type:

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Transfer Functionality:

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

*Enter a ULID, ILSTU email, or Name (Last, First) in the fields above*

- If Budget Center Access is needed for delegate(s) – No (default) or check the box to indicate Yes.
- Enter the name(s) of the delegate(s) in the textboxes. *Please try to limit to 2 delegates.*
- If Budget Center Access is needed for delegate(s) is marked Yes:
  - Access Type – select Operating, Personnel, or Both
  - Is Budget Transfer Functionality Needed? – select No, Operating, Personnel, or Both

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## Additional Information

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Description of Change:

- Provide any additional information you would like to describe the change request.

### AUTHORIZATION

Once the form has been completed, check the “I certify that I have authority...” box and click the “Submit” button.

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## Authorization

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Budget Officer's Supervisor:



*Enter a ULID, ILSTU email, or Name (Last, First) in the field above*



I certify that I have authority to submit this request to my supervisor for approval.

**SUBMIT**

This will submit the form for further approval by the employee’s supervisor. Once supervisory approval has been submitted, the Comptroller's Office will process the request. The form's submitter will receive an email to indicate that the request has been completed.

### QUESTIONS/ASSISTANCE

If you need assistance or have questions about completing the form, please contact the Comptroller's Office via email: [comptroller\\_colleague@ilstu.edu](mailto:comptroller_colleague@ilstu.edu).