

## NEW FOAPAL FORM QUICK VIEW GUIDE

Log into the [New FOAPAL Request Form](#) using your net ID and password.

Click on “**Start New FOAPAL Request**”.

Select “**Today’s Date**” and “**Date Needed**”

Enter “**Proposed Title**” (limit 35 characters; no special characters except dashes and underscores) and “**Requesting Department**”

Enter “**FOAPAL purpose**” - State the purpose and activities of the proposed FOAPAL. What will it be used for or why do you need a new FOAPAL? Please be as specific as you can. Use attachments if needed to provide enough information to clearly define the fund or organization.

Select “**How will the FOAPAL be funded?**” from the drop-down menu.

Choose who the **Financial Manager** will be.

If you wish for the Financial Manager to be the only person with authority for this fund/org, click “**Submit**” at this time. Otherwise, click “**Add Users**” to delegate authority for the new fund/org.

**FINANCIAL MANAGER RESPONSIBILITIES:** The Financial Manager assumes responsibility of all aspects of the fund or organization. The Financial Manager may delegate authority to others by completing the next section. Check as many boxes that apply to each person.

- **Delegated Signature:** Individuals authorized to sign in place of the Financial Manager on purchasing documents, budget transfers and invoices.
- **Invoice Approver:** Authorized to receive approval notices and to verify purchases and approve payments electronically.
- **Create On+Line Documents:** Individuals authorized to create Requisitions in the Banner system.
- **Sign Payroll Documents:** Individuals authorized to approve web time entries for students and faculty/A&P.
- **Order OfficeMax Supplies:** Individuals authorized to order OfficeMax supplies via the web.
- **Prepare Online UPS Labels:** Authorized to create and print on+line UPS labels.
- **P+Card:** Individuals authorized to buy items with department procurement card.
- **Inquiry:** Authorized to only perform inquiries on a fund or organization.

For example, if the Department Chair wanted the assistant to enter documents on Banner, Order OfficeMax supplies and sign approve Web time entries, the Chair would check “Create On+Line Documents, Order OfficeMax Supplies, and Sign Payroll Documents”. The assistant would NOT be able to sign other documents, approve invoices, or purchase with a P+card.

Once all authorized users have been added, **check the electronic signature box** at the bottom and click “**Submit**”.

### APPROVAL PROCESS:

- Mike Hutchinson/Business Office for review
- Lauren Clapp (Grants review)
- Financial Manager for Signature
- Department Head for Signature
- Dean/Director for Signature
- Grants Office Director (for grants only)
- Vice-President for Signature
- Mike Hutchinson/Business Office for accounting information assignment.

For assistance, please contact [Jennifer Smith](#) by email or phone at 581-7819.