Detailed Funds Disbursement Authority Procedure

General – The college uses the Etrieve budget access form to track changes for FDA.

New hires and FDA changes –

- Whether on-boarding a new hire or a role change, the hiring manager will use the New/Updated Computer Requests Form to grant IRIS access for budget viewing as well as access the Etrieve budget access form
- The Etrieve form will guide the FM or hiring manager through the process of adding, changing, or removing access for new hires, role changes, or FDA access changes.
- Access to the budget form in Etrieve is available to all Etrieve users.

- To use the form, follow these instructions:
    - Search for the person's name who you are requesting/changing access in the "Requested For" field.
    - The requested person's FDA access will appear, if access exists.
    - For changes to their current FDA, find the ORGN you wish to change and update the access type.
        - Options for access types are:
            - No Change
            - Remove
            - View Only
            - View & Sign

- Finally, click submit at the bottom of the page.

    - For new access (ORGN does not appear under the requested person's account), scroll down to the bottom and click on the green "Add an ORGN" button.
    - Type in the ORGN you wish to add and then select the access type.
        - Options for access types are:
            - No Change
            - Remove
            - View Only
            - View & Sign

- Finally, click submit at the bottom of the page.

    - If the access is requested by someone other than the FM, the request will be referred to the FM through the Etrieve workflow for an approval.
    - The FM will receive an email from Etrieve asking them to view and approve the request within Etrieve.
    - Before a change can be made, the FM will need to approve the request by selecting the approve icon at the bottom of the page.
    - Alternatively, an email authorization from a VP/Dean or FM may be attached to the original Etrieve request, using the paperclip icon at the bottom of the page, and then submitting the form, using the submit icon at the bottom of the page.

- If the FM has approved the request and selected signing access, the new hire will need budget/signer training. This training will be provided by the business office.

- Staff who are changing roles will be treated the same as new hires; training will be offered if the staff person has never had budget access before or if their access changed from view only to view and signing.
- Additionally, if desired, anyone can reach out to the business office, at anytime, for budget training.
- *Faculty chairs* – Faculty Chairs are the Finance Managers of their department (ORGN) as well as any restricted funds that roll up under their department.
- Chair changes occur after the beginning of the new fiscal year.
  - It is up to the chair in coordination with their FAC and the Dean of Faculty's office to determine the FDA of their department.
  - In July, the chairs will receive an FDA report listing their current FDA for their department/s. It is the chair's responsibility to inform the business office of any changes using the budget access form in Etrieve.
  - FACs are automatically given both view and sign access to all of the ORGNs within their areas and are able to maintain the FDA for their respective departments.

Reporting – FMs will receive a quarterly report listing the ORGNs for which they are listed as the FM and who has access.