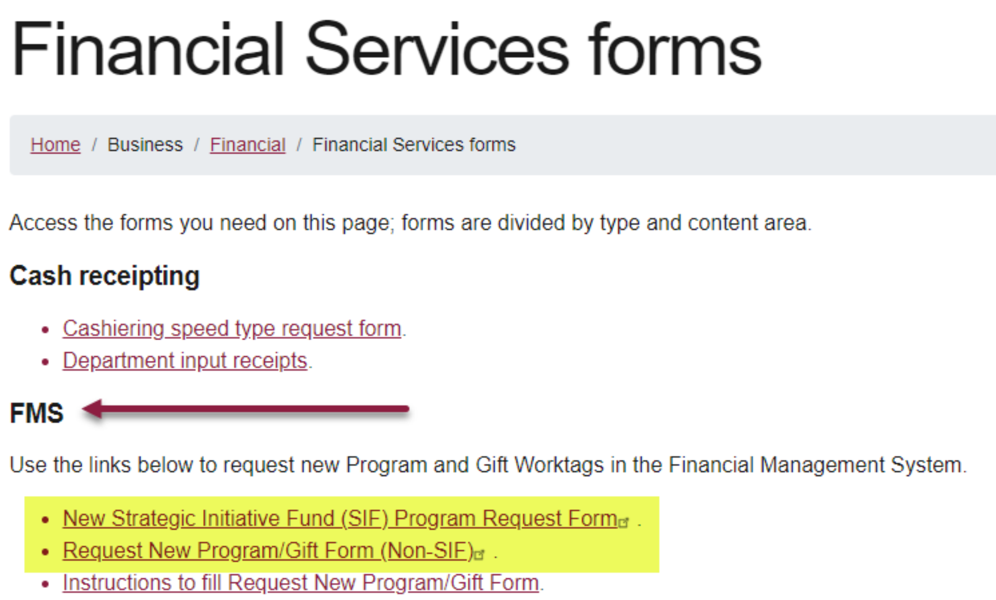
Step one

Locate the correct Adobe Sign form on the Financial Services forms webpage. Below are the two forms available:

- New Strategic Initiative Fund Program Worktag Request Form.
- New Program and Gift Worktag Request Form.


Financial Services forms

Home / Business / Financial / Financial Services forms

Access the forms you need on this page; forms are divided by type and content area.

Cash receipting

- Cashiering speed type request form.
- Department input receipts.

FMS

Use the links below to request new Program and Gift Worktags in the Financial Management System.

- New Strategic Initiative Fund (SIF) Program Request Form .
- Request New Program/Gift Form (Non-SIF) .
- Instructions to fill Request New Program/Gift Form.

Step two

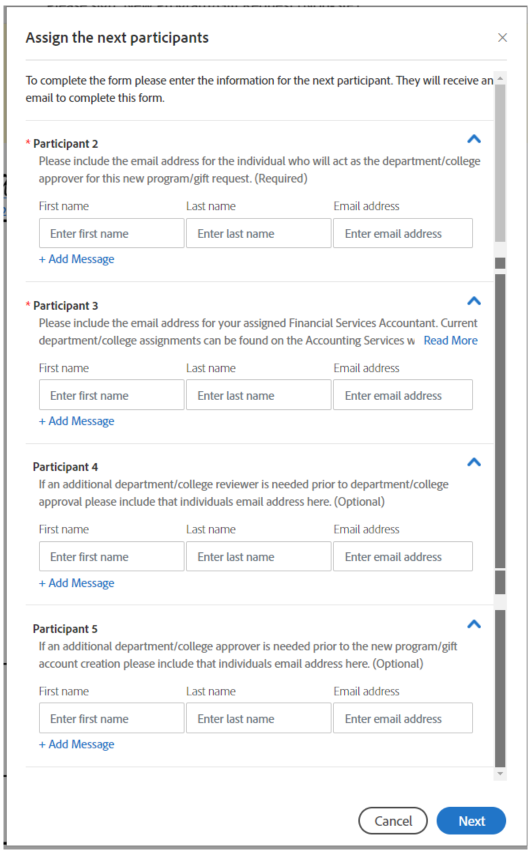
Fill out the request form and provide as much detail as possible about the requested program or gift account.

Step three

Enter the names and email addresses of the individual(s) required to sign off on the new request. Completing this step correctly for your area is crucial to the workflow.

- **Participant two — required:** Include the name and email address of the person who will be the department or college approver for the new program or gift.
- **Participant three — required:** Include the name and email address of your assigned Financial Services accountant. Find the current department or college assignments on the Accounting webpage.
- **Participant four — optional:** If an additional department or college reviewer is needed before approval, please include the person's name and email address. If no other review is necessary, this step is not required.
- **Participant five — optional:** If an additional department or college approver is needed before the new account creation, please include the person's name and email address. If no other approval is needed, this step is not required.

Note: For Strategic Initiative Fund accounts, the workflow is built to automatically route to the Office of Planning and Budget for approval. The requestor does not need to enter their email address in a participant field.



Step four

1. Enter your email address as the requestor.
2. You will receive an email at the address you provided to confirm your signature and identity.
3. The form will not allow you to continue through the desired workflow until the requestor clicks and confirms their email address.
4. Once the form is complete, all parties involved will receive an email with a form copy that shows your new value's name and financial management system reference ID.

Contact your Financial Services accountant with questions or for more information.