How to Request a New Program/Gift Worktag

Requester Step One:
Locate the correct DocuSign link on the Financial Services Forms website. There are two forms available:

1. Specifically, for new Strategic Initiative Fund — SIF — program requests.
2. For all other types of Program and Gift Worktag Requests.

Requester Step Two:
Enter the names of the individuals required to sign off on the new request.

1. Enter your name and email address as the Requester. Required
2. If an additional review is required for your department before approval enter their name and email address here. Optional
3. Enter the designated individual and their email address for your area that should approve the request. Required
4. For your area, if two approvals are required enter the name and email address of the second individual here. Optional
5. Enter your designated financial services accountant and their email address. Required
Requester Step Three:
Fill out the request form providing as much detail as possible about the requested worktag.

Requester Step Four:
Complete the budget.

For General Operating requests — GOT/GOA — no budget is required. Instead, you will need to process a budget amendment after the new worktag has been fully set up.
**Requester Step Five:**
Sign and attach any additional information.

The form will now route onto your designated Department or College approval for review.

Additional steps will follow. If you have any questions throughout the process, please contact your financial services accountant.

Once the process is complete, all parties involved will receive an email with a copy of the completed form. It will contain the name and financial management system reference ID for your new value.