

## Instructions to request a new gift worktag

### Step one

1. Locate the [Request a New Gift Form](#) on the Financial Services forms webpage.

## 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](#).
- [Customer invoice receipting](#).
- [Department input receipts](#).
- [Departmental receipting with FMS](#).

**FMS** 

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

- [Instructions to request a new program worktag](#).
- [Request New Gift Form](#) .
- [Instructions to fill Request New Gift Form](#).

### Step two

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

### Step three

1. Enter the names and email addresses of the individual(s) required to sign off on the new gift request. Completing this step correctly for your area is crucial to the workflow.
  - a. **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.
  - b. **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](#).
  - c. **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.
  - d. **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

### Assign to next participants

To complete the form please enter the information for the next participant. They will receive an email to complete this form.

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**\* Participant 2** ⬆

Please include the email address for the individual who will act as the department/college approver for this new program/gift request. (Required)

|  |  |
|--|--|
| First name                                       | Last name  |
| <input type="text" value="Enter first name"/>    | <input type="text" value="Enter last name"/>     |
| Email address                                    | Confirm email address                            |
| <input type="text" value="Enter email address"/> | <input type="text" value="Enter email address"/> |

[+ Add Message](#)

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**\* Participant 3** ⬆

Please include the email address for your assigned Financial Services Accountant. Current department/college assignments can be found on the Accounting Services w [Read More](#)

|  |  |
|--|--|
| First name                                       | Last name  |
| <input type="text" value="Enter first name"/>    | <input type="text" value="Enter last name"/>     |
| Email address                                    | Confirm email address                            |
| <input type="text" value="Enter email address"/> | <input type="text" value="Enter email address"/> |

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**Participant 4** ⬆

If an additional department/college reviewer is needed prior to department/college approval please include that individuals email address here. (Optional)

|  |  |
|--|--|
| First name                                       | Last name  |
| <input type="text" value="Enter first name"/>    | <input type="text" value="Enter last name"/>     |
| Email address                                    | Confirm email address                            |
| <input type="text" value="Enter email address"/> | <input type="text" value="Enter email address"/> |

[+ Add Message](#)

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**Participant 5** ⬆

If an additional department/college approver is needed prior to the new program/gift account creation please include that individuals email address here. (Optional)

|  |  |
|--|--|
| First name                                       | Last name  |
| <input type="text" value="Enter first name"/>    | <input type="text" value="Enter last name"/>     |
| Email address                                    | Confirm email address                            |
| <input type="text" value="Enter email address"/> | <input type="text" value="Enter email address"/> |

[+ Add Message](#)

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#### **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.