

# Funds - Banner Maintenance Request Form

**NOTE:** Please email approved form to [finance@westernu.edu](mailto:finance@westernu.edu) for processing

## 1. Request Info **Required:**

1a. Request type:            Add            Modify            Terminate

1b. Name of fund (35 character maximum):

1c. Fund number (only if **modifying or terminating**):

1d. Requestor's name:

1e. Requestor's home department name & org:

1f. Requestor's email address:

## 2. When Adding, **Required:**

2a. What is the funding or new revenue source for this fund?

2b. Will the use of this fund include donor restrictions? If yes, please explain the nature of the restrictions.

2c. What is the purpose of the new fund? What type of activities will this fund be making for expenditures?

2d. Who will be the Financial Manager for this fund (Banner ID)?

2e. Please submit Fund access requests via the online form here: [Financial Information Access Request Form](#)

## 3. When **Modifying:** What modification is needed, and why? Response **required** when **MODIFYING** a fund:

## 4. When **Terminating:** What is the reason for terminating this fund? Response **required** when **TERMINATING** a fund:

5. Effective date of addition or modification (mm/dd/yy):

6. Effective date of termination, if any (mm/dd/yy):

**APPROVALS**

Dean/Department Head: \_\_\_\_\_  
Signature

University Controller: \_\_\_\_\_  
Signature

**UFST OFFICE USE ONLY**

New fund number:

Default organization:

Default program:

Predecessor fund:

Data-enterable (Y/N):

Banner Restriction Indicator:

Unrestricted

Temporarily Restricted

Permanently Restricted

UFST Office routing:

Initials

Date

Entered by:

Requestor notified:

Master Fund List updated:

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