

# Organizations - 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 organization (35 character maximum):

1c. Organization 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, budget re-allocation, or new revenue source for this organization?

2b. What type of activities will this spending unit be making for expenditures?

2c. Who will be the Financial Manager for this organization (Banner ID)?

2d. Please submit Organization 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** an organization:

## 4. When **Terminating:** What is the reason for terminating this organization? Is another organization being used, or will be used as a replacement? Response **required** when **TERMINATING** an organization:

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

**APPROVALS**

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

Interim Treasurer & CFO: \_\_\_\_\_  
Signature

Executive Director of Financial Planning & Analysis: \_\_\_\_\_  
Signature

**UFST OFFICE USE ONLY**

New organization number:

Default program:

Predecessor organization:

Data-enterable (Y/N):

UFST Office routing:

Initials

Date

Entered by:

Requestor notified: Master

Org List updated:

Revised 8/9/21