

**NEW INDEX REQUEST FORM (Not to be used for contracts, grants, or service enterprises)**

Name of Person Making Request \_\_\_\_\_ Phone # of Requestor \_\_\_\_\_  
 Date of Request \_\_\_\_\_ Date Index to be Activated \_\_\_\_\_  
 Name of Financial Manager/PI \_\_\_\_\_ Financial Manager/PI Banner ID \_\_\_\_\_  
 Title for Index \_\_\_\_\_ Purpose of Index \_\_\_\_\_  
 (Max 30 characters)  
 College Code (CL code) \_\_\_\_\_ Research Center \_\_\_\_\_  
 Department Code (DP code) \_\_\_\_\_ Unit Code (U code) \_\_\_\_\_  
 (run Organization Hierarchy Report – <http://controller.usu.edu> - to get this #)  
 Restrictions on Use of Funds \_\_\_\_\_ Restrictions Set by Whom \_\_\_\_\_

TYPE OF FUND (Source of Revenue) (Please select one)		TYPE OF PROGRAM (Purpose of Expenditures) (Please select one)	
_____ Tuition/Fees	_____ Sales/Services/Materials	___*_*_*_ Goods and/or services for USU Departments for a fee (Please call ext. 0589 for alternate form)	
_____ Federal Appropriations	_____ Conferences/Institutes	_____ Instruction	_____ Student Services
_____ State Appropriations	_____ Parking/Traffic	_____ Research	_____ Institutional Support
_____ Private Gifts/Grants	_____ Investment Earnings	_____ Public Service	_____ Operation/Maintenance
_____ Endowment Income	_____ Administrative Fees	_____ Service Departments	_____ Scholarships/Fellowships
_____ Indirect Cost Recovery		_____ Auxiliary Enterprises	_____ Academic Support
_____ Other (please specify) _____		_____ Other (please specify) _____	

(See page 2 for Type of Fund and Type of Program explanation)

1-Describe the general purpose and use of the index requested, 2- Describe the sources of revenue and the purpose of the index expenditures. 3- If revenue is from sales, describe product or services, customers, etc.

**Complete this section only if requesting a new unit or the Financial Manager/PI is not already set up**

Access to Index Granted to: Name \_\_\_\_\_ Banner User Name \_\_\_\_\_  
 Name \_\_\_\_\_ Banner User Name \_\_\_\_\_  
 Requisitions/Invoices: Level \_\_\_\_\_ Name \_\_\_\_\_ Banner ID \_\_\_\_\_  
 Level \_\_\_\_\_ Name \_\_\_\_\_ Banner ID \_\_\_\_\_  
 Level \_\_\_\_\_ Name \_\_\_\_\_ Banner ID \_\_\_\_\_  
 Level \_\_\_\_\_ Name \_\_\_\_\_ Banner ID \_\_\_\_\_

**Controller's Office Use:** Manager of Finance Systems Approval \_\_\_\_\_

**\*\*\*Both Signatures are required**

**(For State Appropriated Funds & New Departments)**

After obtaining signatures, submit to the Budget office if requesting State Appropriated Index Or if new dept is being established; otherwise, submit directly to the Controller's Office.

**Department Head Signature & Date** \_\_\_\_\_ **Budget Office Signature & Date** \_\_\_\_\_  
**Printed Name** \_\_\_\_\_  
**Dean or Vice President Signature & Date** \_\_\_\_\_ **Budget Office Signature & Date** \_\_\_\_\_  
**Printed Name** \_\_\_\_\_

**Controller's Office Use:**

Accountant Name & Phone \_\_\_\_\_ Fund \_\_\_\_\_ Fund Type \_\_\_\_\_  
 Program Code & Approval \_\_\_\_\_ Predecessor Fund \_\_\_\_\_  
 Org \_\_\_\_\_ Index \_\_\_\_\_ (see title above) Sales Tax Code & Approval \_\_\_\_\_  
 Predecessor Org (if new notify I.T.) \_\_\_\_\_ Org Title \_\_\_\_\_  
 Director's Approval \_\_\_\_\_ Setup Date in Banner \_\_\_\_\_ Initials \_\_\_\_\_

### **TYPE OF FUND (Source of Revenue)**

**Tuition/Fees:** assess against students for education purposes

**Federal Appropriations:** made available by federal legislative acts for current operations

**State Appropriations:** made available by state legislative acts for current operations

**Private Gifts/Grants:** from non-governmental organizations & Individuals for current operations

**Endowment Income:** from endowment funds or funds held by others under irrevocable trusts

**Indirect Cost Recovery:** from sponsored projects for purposes common to a number of activities

**Sales/Services/Materials:** from instruction, research, public services or auxiliary enterprise operation

**Conferences/Institutes:** registration fees for conferences & institutes

**Parking/Traffic:** fees assessed for parking or traffic management

### **TYPE OF PROGRAM (Purpose of Expenditures)**

**Goods and/or services for USU Departments for a fee** (Please call ext. 0589 for alternate form)

**Instruction:** for all activities part of the instruction program

**Research:** for activities specifically organized to produce research outcomes

**Public Service:** for activities established to provide services to external groups

**Auxiliary Enterprises:** furnishes goods or services to students, faculty & staff for a fee

**Student Services:** for admissions, registrar & activities contributing to students' well-being

**Institutional Support:** for executive level management & planning

**Operation/Maintenance:** for operation & maintenance of facilities

**Scholarships/Fellowships:** in the form of grants, stipends, prizes & awards to students

**Academic Support:** to provide support services (library, media, deans, curriculum dev.)