

This form serves as the College's official record of authority for processing financial transactions including, purchasing, travel, IDT's, Journal entries, transfers (budget and actual dollars), etc., as well as maintains records of approved view-only access to finance information. This form also fulfills the College's audit requirements. An **Index/FOP Access Form** is **required** for every Index (Fund, Organization, Program) for which your department has financial responsibility.

Regardless of the role selected (Approver or SSB view access), each person listed on the form is **required** to be set up in the appropriate finance security role within Banner Finance. Therefore, each user must have a MyCharleston (Luminis) account, which is assigned when employed or registered as a student.

To be assigned access to the appropriate finance security roles, an approved **Self-Service Banner (SSB) Authorization Request Form** (<http://controller.cofc.edu/banner-system-access-forms/index.php>) must be processed before the Index/FOP Access form can be processed, and access to financial information granted. If you are unsure whether you are set up in the appropriate finance security roles within Banner, please contact Patrick Fillippa (fillippapm@cofc.edu) in the Controller's Office for confirmation.

Each form submission **supersedes and replaces** all previous Index/FOP Access Forms. This form must be re-submitted, in its entirety, each time a person is added, changes departments, changes roles, or leaves the College, therefore, carefully consider your long-term needs, and ensure that all who will need access to, or be approvers for, each index are listed.

The **AiM approver** field is **required** for this form to be valid. This person is responsible for approving Facilities Management work orders for the specific index.

Original signatures are **required** for this form to be valid. If additional pages are attached, two approval signatures are required on the bottom of all pages.

FINANCE SECURITY ROLE: Please indicate on the Index/FOP Access Form which of these roles your users require. If no role is selected, the form may be returned for proper completion.

Self-Service (SSB) view access - The user will only have access to view financial information for the specific index. The user cannot approve transactions of any type for the specific index. A signature is not required, however, all persons with view-only rights must be listed on the form, or otherwise their access will be removed.

Approver (for any approver role) - The user will have the ability to approve financial transactions for the specific index, up to the approval limit noted on the form. A signature is required if any approver role is selected.

APPROVAL LIMITS:

Departmental Users - each department selects an approval limit for each approver, up to \$ 4,999.99;

EVP's and Academic Deans - up to \$49,999.99;

EVP/CFO for Business Affairs - all financial transactions \$ 50,000, and above.

There are several roles within eProcure: Shoppers, Approvers, and Senior Executive Approvers:

Shoppers will not need to be listed on this form as they do not need any special purchasing permission in either Banner or eProcure. Shoppers can only create a shopping cart with their desired purchase, and will then need to assign the shopping cart to a Requisitioner.

Approvers are able to submit both their own carts, and carts assigned to them, for purchase up to their purchasing/approval limit, which is established with this form. Carts with totals that exceed an Approver's approval limit, must be approved by an Approver with a higher approval limit, and authority.

Senior Executive Approvers (Executive Vice Presidents and Academic Deans) have the authority to approve purchases up to \$49,999.99. Charges \$50,000, and above, must be approved by the EVP/CFO for Business Affairs.

When completed, please forward this form, with original signatures, to [Josh Williams](#) in the Controller's Office.



Index/FOP Access Form (Revised 7/14/22)

NOTE: *Original signatures* required for this form to be valid. Please remit this form to the Controller's Office for processing.

NOTE: This form **supersedes and replaces** all previous Index/FOP Access forms. Please list all people who will need access to, or be approvers for, the index. All others to be removed.

NOTE: This form is data-enterable in all fields, except where a signature is required.

Initial form submission: Index: Index name:
 Update/change authorized people: Fund: Vice President or Academic Dean:
 Date of submission: Organization: Chair/Director/Department Head:
 Effective date of form: Program: Principal Investigator (if different than above):
 End date (for grants): **AiM Approver** for Physical Plant work orders (One person) - **REQUIRED**:

Source of funds: Federal
 State
 Other (please describe)

NOTE: If an approver limit is not entered, the default will be \$4,999.99.

Name (printed):	CofC email address:	Signature:
Self-Service Banner (SSB) view access	EA / IDT / JE approver Budget transfer approver eProcure approver	<hr/> <i>(required only if an APPROVER role is selected)</i>
		Approval Limit (required): \$

Name (printed):	CofC email address:	Signature:
Self-Service Banner (SSB) view access	EA / IDT / JE approver Budget transfer approver eProcure approver	<hr/> <i>(required only if an APPROVER role is selected):</i>
		Approval Limit (required): \$

Name (printed):	CofC email address:	Signature:
Self-Service Banner (SSB) view access	EA / IDT / JE approver Budget transfer approver eProcure approver	<hr/> <i>(required only if an APPROVER role is selected):</i>
		Approval Limit (required): \$

Name (printed):	CofC email address:	Signature:
Self-Service Banner (SSB) view access	EA / IDT / JE approver Budget transfer approver eProcure approver	<hr/> <i>(required only if an APPROVER role is selected):</i>
		Approval Limit (required): \$

Signature **(Required)**: _____ Signature **(Required)**: _____

NOTE: Attach additional pages, if necessary. Two signatures are required on the bottom of all pages.

(Circle): Department Chair / Director / Head; Or
Principal Investigator (grants and contracts)

(Circle): Executive Vice President / Dean / Designee