



Request for New or Change in an Existing Account or Fund

- ADD
- CHANGE
- INACTIVATE

Requested by: _____
 Phone Extension: _____
 Department: _____

School/Department Section:

Account Description (30 Characters) _____ Effective Date (mm/dd/yyyy) _____	Fund Description (30 Characters) _____ Manager Name _____
Purpose of Request _____	

Finance (Only) Section:

ACCOUNT: Short Description (10 characters): _____ Assigned Value: _____ Monetary Account Type: <input type="checkbox"/> Revenue <input type="checkbox"/> Asset <input type="checkbox"/> Net Asset <input type="checkbox"/> Expense <input type="checkbox"/> Liability <input type="checkbox"/> School Statistical Account: <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, unit of measure: _____	FUND: Fund Class _____ Manager Name _____ Assigned Value: _____ Distribution DEPTID: _____ Distribution DEPTID Class: _____																																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Tree</th> <th style="width: 50%;">Node</th> </tr> </thead> <tbody> <tr><td>ACCOUNT OWNERS</td><td></td></tr> <tr><td>ACCTROLLUP</td><td></td></tr> <tr><td>ACCT PLAN</td><td></td></tr> <tr><td>ACCT WHITEBIRCH</td><td></td></tr> <tr><td>UNIV NAT CLASS</td><td></td></tr> <tr><td>UNIV OPER STMT</td><td></td></tr> <tr><td>ACCTFAALLOC</td><td></td></tr> </tbody> </table>	Tree	Node	ACCOUNT OWNERS		ACCTROLLUP		ACCT PLAN		ACCT WHITEBIRCH		UNIV NAT CLASS		UNIV OPER STMT		ACCTFAALLOC		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Tree</th> <th style="width: 50%;">Node</th> </tr> </thead> <tbody> <tr><td>EF CATEGORY</td><td></td></tr> <tr><td>EF INVEST</td><td></td></tr> <tr><td>EF SCHOOL</td><td></td></tr> <tr><td>FUND REPORTING</td><td></td></tr> <tr><td>LOAN FUNDS</td><td></td></tr> <tr><td>NET ASSETS</td><td></td></tr> <tr><td>PLANT</td><td></td></tr> </tbody> </table>	Tree	Node	EF CATEGORY		EF INVEST		EF SCHOOL		FUND REPORTING		LOAN FUNDS		NET ASSETS		PLANT	
Tree	Node																																
ACCOUNT OWNERS																																	
ACCTROLLUP																																	
ACCT PLAN																																	
ACCT WHITEBIRCH																																	
UNIV NAT CLASS																																	
UNIV OPER STMT																																	
ACCTFAALLOC																																	
Tree	Node																																
EF CATEGORY																																	
EF INVEST																																	
EF SCHOOL																																	
FUND REPORTING																																	
LOAN FUNDS																																	
NET ASSETS																																	
PLANT																																	
APPROVED BY: _____ DATE APPROVED: _____																																	

Form Routing: Funds: Forward to Karen Pepper, General Accounting, TAB, Medford
 Accounts: Forward to Ed Mahoney, General Accounting, TAB, Medford