

AUTHORIZED SIGNATURE CARD INSTRUCTIONS

The Authorized Signature Card designates individuals with direct authority and related responsibility to commit funds of the org and fund number listed on the form. The Signature Card is valid through the end of each fiscal year. For sponsored projects, the Signature Card is valid through the fund ending date. The Department, School/College, Center/Institute or Program entity is responsible for updating the Authorized Signature Card when approval changes occur.

Complete the top section for both restricted and unrestricted funds by filling in the fiscal year, current date, organizational unit title (department) and org and fund numbers. For restricted funds, also fill in the project title, project ending date and principal investigator.

RESTRICTED FUNDS:

Sponsored Projects: The Principal Investigator (PI) and designee are the only authorized signers (in the *Authority to Commit Funds* section) on the sponsored project. The PI has full management authority and responsibility; however, the PI may designate an individual to commit project funds (indicated by initials in the *Approved By PI* column) with the understanding that the individual has direct knowledge of project activities. Authority to approve time sheets (indicated by an "X" in the *Personnel* column) implies that the individual has direct knowledge that the work has been performed. Individuals designated to perform data entry on sponsored projects are understood to have received approval from the PI or designee and have the delegated authority and responsibility to enter transactions in Banner. Data entry personnel must complete formal Banner Finance System training.

Agency, Student Government and Capital Accounts: The Program Director is the authorized signer (in the *Authority to Commit Funds* section) of the account. The Program Director may designate an individual with approval responsibility and authority. Individuals designated to perform data entry on agency, student government and capital accounts are understood to have received approval from the PI or designee and have the delegated authority and responsibility to enter transactions in Banner. Data entry personnel must complete formal Banner Finance System training.

Complete the next sections as indicated below and obtain signatures.

Authority to Commit Funds: Designated individuals have direct authority and related responsibility to commit funds of the org and fund number. These individuals are understood to have followed internal procedures established by the Department, School/College, Center/Institute or Program entity. If necessary, each entity may develop internal transmittal approval forms.

| Name | Sample Signature | Purchase | Accounts Payable | Personnel | Travel | JV | Budget | Approved By PI |
|-------------------------|---|--|------------------|-----------|--------|----|--------|----------------|
| Type or print full name | Obtain actual signature of named individual | Place an "X" in each column for which the named individual has approval authority and related responsibility | | | | | | |

* See the legend on lower left of form for an explanation of the *Purchase, Accounts Payable, Personnel, Travel, JV* and *Budget* columns.

EXAMPLE: Per internal procedures, the Dean's office would like to retain approval for equipment purchases. Thus, the Dean's signature is required on the School/College's special transmittal approval request form. When funds are actually committed into Banner, it will be assumed that all lines of approval have been met. Data entry personnel have the authority and responsibility to enter transactions.

Data Entry: Designated individuals have the delegated authority and responsibility to enter transactions in Banner and are understood to have followed internal procedures and received approval of the department head or PI. These individuals must complete formal Banner Finance System training. Once a transaction is entered into Banner, it is considered authorized.

| Name | Userid | Sample Signature | Purchase | Travel |
|-------------------------|----------------|---|--|--------|
| Type or print full name | Fill in userid | Obtain actual signature of named individual | Place an "X" in each column for which the named individual has approval authority and related responsibility | |

* See the legend on lower left of form for an explanation of the *Purchase* and *Travel* columns.

Signature of Chancellor, Vice Chancellor, Assoc. Vice Chancellor, Dean or Director: This signature indicates acknowledgement of the approval authority and related responsibility of the individuals named in the *Authority to Commit Funds* and *Data Entry* sections above, including Principal Investigators (PIs). (NOTE: The Signature Card is not valid without this signature.)

Individual designated to act on behalf of Chancellor, Vice Chancellor, Assoc. Vice Chancellor, Dean or Director in his/her absence: This box indicates the individual designated with signature authority in the absence of the Chancellor, Vice Chancellor, Assoc. Vice Chancellor, Dean or Director. If this box is empty, signature authority has been retained by the person signing on the signature line.