

## Procedures and Questionnaire for requesting the establishment of a new Account (Index) in CLAS:

1. All requests for the establishment of new account (index) must be sent to the Dean's Office for approval and processing.
  
2. Answer the following questions/statements to determine whether or not you should set-up a new account or use an existing account within the department.
  - Is the account for a new faculty member that will be receiving less than \$35,000 in set-up funds? Yes\_\_\_ No \_\_\_
  - We will be making a one-time deposit of funds of less than \$35,000. Yes\_\_\_ No \_\_\_
  - Has the donor or organization that gave the funds placed any restrictions on the use of these funds? Yes\_\_\_ No \_\_\_
  - Is the University required to submit a report (e.g. accounting or expenditure report) to the donor pertaining to how these funds were used? Yes\_\_\_ No \_\_\_
  - Does the department currently utilize another account (e.g. Department Designated Fund 2XXXXX) for similar activities to this type of request? Yes\_\_\_ No \_\_\_

If you answered "YES" to any of these questions, the funds probably should go into an existing account within the department. The Accounting Department does not want, or have the staffing to be setting-up "nickel and dime" accounts when the funds can be easily deposited and monitored in an existing account within a department. However, if you believe there is good justification to merit a new account, please proceed to step 3 and explain your justification in the email that you are sending to the Dean's Office with the attachments.

3. If you answered "No" to all of the questions/statements above, it is likely your request will be approved and therefore please proceed to this link:  
<http://fisops.wayne.edu/accounting/index.php> and then click the link "Request to create Index" near the lower left side of this website.

- Complete the “request to create index pdf form” to the best of your ability and save it to your desktop as a pdf document. DO NOT CLICK THE “SIGN AND SUBMIT BY EMAIL” since this is only to be utilized by the Dean’s Office.
- Attach this questionnaire along with the “request to establish a new account pdf form” and send via an email to Joe Kieleszewski ([joek@wayne.edu](mailto:joek@wayne.edu)) in the Dean’s Office.

If there are no issues to resolve with this request, the Dean’s Office will forward the request within 3 working days to General Accounting. Once General Accounting receives the request from the Dean’s Office, they are supposed to notify the Dean’s Office within 10 working days of the new account/index. Once the Dean’s Office receives this notification of the new account from General Accounting, we will notify the administrative assistant within the department.

If you have any questions, please contact Joe Kieleszewski in the Dean’s Office at 577-8007. Thank you.