

New Worktag Request Form

**Worktag Type:** Cost Center Spend Category Revenue Category Project

 Gift Grant Location College Designated Special Reporting

**\*Description (What will this be used for?):**

**\*Workday Formal Name:**

**\*Related Cost Center:**

**\*Related Program:**

**Related Fund:**

**Individuals Needing Access:**

**FOR NEW COST CENTERS ONLY:**

**Is this cost center expected to exist in perpetuity? Yes No**

**Will this cost center have salaries charged to it? Yes No**

|  |
| --- |
| **For ADVANCEMENT USE: (fund requestor fill out all fields with \*)** |
| **\* Fund Start Date:** |  |
| **\* Fund Is (circle/highlight)?** | **Budget Relieving** | **Budget Augmenting** |  |
| **\* Fund Type (circle/highlight):** | **Athletics Financial Aid Institutional Support Grant Other (discuss with AVP Adv-Ops)** |
| **\* Fund category (circle/highlight):** | **School of Arts School of Communications ArtsEmerson HowlRound WERS**  |
|  | **Ploughshares Marlboro Emerson (all general/central support)** |
|  **\* Endowed or Current Use:** | **Endowed ($100K min)** | **Current Use (Restricted, $50K min)** |  |
| **Required Stewardship Reporting:** | **Endowment Report Scholarship Report BOTH** |
| **Supporting documentation including donor agreement and proof of payment annexed hereto (if Advancement-related). For endowed funds in Upper Limit (currently 5%) pool, evidence of VP of Institutional Advancement and VP of Finance approval is required.****Signature Approval for 5% Pool (Indicate N/A for General Pool or Spendable):** |
| **\* Requestor (sign/type name):** |  | **\* Date:**  |
| **Please send completed form and fund documentation to AVP Advancement Administration for approval and documents will be submitted to AS for fund creation and then to Accounting/Finance for next steps.** |

**For Finance Use:**

**Date Received: Gift Instrument Received: Yes No**

**Workday Formal Name:**

**Date Established: Reference ID:**

**Gift Budget Relieving/Augmenting Determination:**

**If “Scholarship” Gift, provide Detail Code that was created:**

**Confirm Banner Fund was created and linked to detail code:**

**Confirm Banner to Workday Crosswalk was updated for new Banner Fund to Workday Gift:**

**Approved (Controller /Sr. Director of Business Intelligence): Date:**

If Advancement-related, when complete please scan and email to advancement\_services@emerson.edu. If Scholarship fund, please also send completed form and documentation to Bills@emerson.edu and finaid@emerson.edu. Otherwise, please return final copy to requestor.