

New Fund Request Instructions

1. Select the “*Account Administration*” link from the Forms list on the Controller’s website (controller.nd.edu/forms).
2. Click the “*New Fund Request*” link.

Account Administration

- [Account File Maintenance Request](#) (PDF)
- [Activity Code Request](#) (PDF)
- [Banner 9 Request for Access](#) (Online form)
- [Change of Authorization](#)(Restricted Funds) (PDF)
- [Delegation of Authority Report](#) (PDF)
- [Gift Routing Form](#) (PDF)
- [GLEz/buyND Data Access Request](#) (online form)
- ➔ • [New Fund Request](#) (online form)

3. Complete the form (shown below). Required fields are denoted with a red asterisk. The *Program Code* is a new field as of May 2022. A detailed Program Code Reference Guide is included at the end of these instructions.

Request New Banner Fund

New Banner Finance Fund

Request a new Banner Finance Fund. Requests are routed to the Controller's Office for Approval and Completion. Upon Completion Submitters will receive an email notification with the created Fund number.

Fund information

*Name of New Fund

Approver

*Organization

*Type of Account

*Beginning Date

Ending Date

Program information

*Program Code

Check if this fund requires additional program codes

[Click here to view Program Codes](#)

New Banner Finance Fund

Funding source information

*Source

*Will the funding source be the same each year?

Fund purpose and restriction information

*Purpose of Fund

*Restriction Type

Additional Fund Restrictions

Fund access rights information

*Budget administrator

Add names of anyone besides the Budget Administrator who should have access to view this fund in GLEz (i.e. Business Manager)

Access rights

4. When the form is complete, click the "Submit" button at the bottom of the page. The form will automatically be forwarded for setup in Banner.

Notes:

- The “*Name of New Fund*” field is limited to 35 characters to match Banner specifications.
- The “*Approver*” field is optional but can be used to facilitate internal department procedures. The Approver will receive advance notification of the fund request, but no action is necessary unless they do not want the fund to be created.

Program Codes
Detailed Reference Guide

Category/
Code

Title

Definition

Examples

Instruction			
10000	Instruction	Classroom instruction for both credit and non-credit courses. <i>(see code 10002 for Online)</i>	Department chairs' activity funds (Classroom) Faculty chair funds (Classroom)
10001	Departmental Research	Use for the professional development and/or general research activities of faculty that are NOT tied to a formal plan or funded by internal or external awards.	Start-up funds Chair R&PD funds Faculty R&PD funds
10002	Online Instruction	Online instruction for both credit and non-credit courses. <i>(see code 10000 for Classroom)</i>	Department chairs' activity funds (Online) Faculty chair funds (Online)
10003	Student Experiential Learning	Students engaging in a learning process whereby they learn by doing.	Student Seminars for credit Student Internships for credit Student Community Service for credit
Research			
20000	Organized Sponsored Research	Use for research activities funded by <u>external</u> awards/grants.	Cancer Research funds Radiation Lab
20001	Organized Internal Research	Use for formally planned, budgeted research activities that are funded by <u>internal</u> awards.	Strategic Academic Planning Committee (SAPC) Clinical & Translational Sciences Inst (CTSI) Faculty Research Support Program (FRSP)
Public Service			
30000	Public Service	Non-instructional activity that primarily benefits external parties.	Community Service funds ACE funds in support of the public
Academic Support			
40000	Academic Support	Includes support for instruction, research or public service; Dean's office activities would be specifically included in academic support.	Dean's Office activities Formally planned/budgeted faculty development- (sabbaticals, faculty awards, etc.) Curriculum development Museums and Libraries
Student Activities and Services			
50000	Student Activities and Services	Activities that primarily contribute to students' development outside of formal instruction. <i>(Not specific to codes 50001-50006)</i>	Admissions Activity funds Registrar Activity funds
50001	Undergraduate Programming	<u>Undergraduate</u> students' development outside of formal instruction. <i>(Not specific to codes 50003-50006)</i>	Undergraduate Program/Project funds Undergraduate Student Organization funds Undergraduate Student Counseling funds
50002	Graduate Programming	Graduate students' development outside of formal instruction. <i>(Not specific to codes 50003-50006)</i>	Graduate Program/Project funds Graduate Student Organization funds Graduate Student Counseling funds
50003	Cross-Cultural	Students' development outside of formal instruction through participation in Cross-Cultural activities.	Cross-Cultural Performance funds Cross-Cultural Event funds
50004	Liturgy and Music	Students' development outside of formal instruction through participation in liturgy and music activities.	Summer Music Experience funds Campus Ministry funds
50005	Communications and Networking	Student's development outside of formal instruction through participation in communications and networking activities.	Communication Skills Program funds Networking Strategies Program funds
50006	Student Recruitment	Activities related to assisting students with post-graduation job placement.	Career Center funds
Plant Operation and Maintenance <i>(unlikely that college-level funds should utilize these codes; possible exception is code 60001)</i>			
60000	O&M-Services & Service Bldgs	Administration, operation, maintenance of physical <u>service</u> facilities.	Equipment Replacement funds (Service Facilities) Building R&M funds (Service Facilities)
60001	O&M-Acad/Admin Buildings	Administration, operation, maintenance of physical academic and administrative facilities	Equipment Replacement funds (Acad/Admin Facil) Building R&M funds (Acad/Admin Facilities)
General Admin and Support <i>(unlikely that college-level funds should utilize these codes)</i>			
70000	General Administration	Central, executive level activities for management of University. <i>(Officers with institution-wide responsibility; President, Provost, EVP, etc.)</i>	Finance Legal Human Resources Institution-wide funds (Development N/A)
70001	Fundraising	Development and other fundraising-specific activities. <i>(Only used by Development Department)</i>	Advisory Councils College Level Fundraising Activities
Auxiliary Enterprises <i>(unlikely that college-level funds should utilize these codes)</i>			
91000	Auxiliary Enterprises	Generally self-supporting activities that provide goods or services for a fee.	Residence Halls Food Services Bookstore Athletic
Student Financial Aid <i>(NOT used for faculty fellowships or awards, use 40000 instead)</i>			
92000	Student Financial Aid (SFA)	Need Based undergraduate scholarships.	Graduate Fellowships Student Prizes or Awards
92010	SFA-Self-Help	Self-Help Relief (relieves student loans).	Class Scholarships ND Club Scholarships
92020	SFA-Merit Awards	Awards granted based on merit.	Merit Scholarships
92030	SFA-Enrichment	Enrichment (typically tied to a merit scholarship)	Summer Project Awards Special Research Awards
University			
99000	University	Use for funds that aren't expected to have programmatic expenses that roll up into the University's financial statements.	Agency Funds Endowment Funds Charitable Trusts