Financial Signature Approval

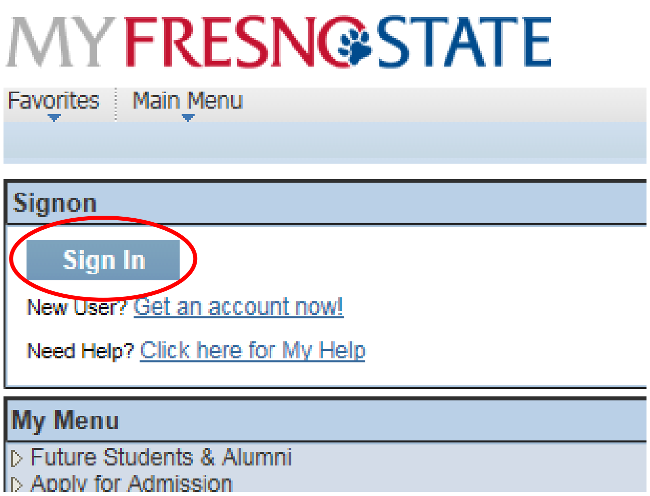
All Department ID's (Org ID's) must have a new Financial Signature Approval form created and submitted to Procurement at Mail Stop JA111 to be able to process any financial transactions (purchase requisition, alteration, direct pay, travel, budget transactions, etc.). Any Financial Signature Approval forms created before March 7, 2016 are no longer active forms.

Anyone listed on the Financial Signature Approval form as being approved to sign for a Department ID will be allowed to sign for **all** financial transactions for **all** Funds associated with that particular Department ID.

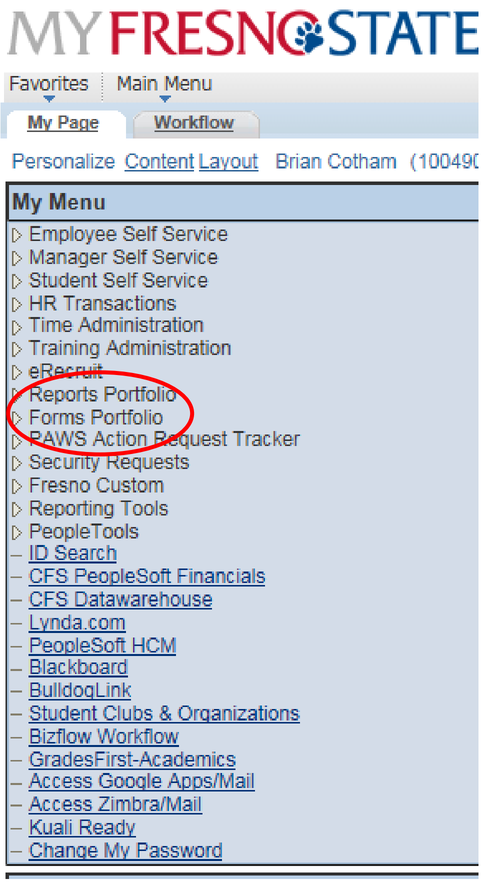
Anyone can create the initial Financial Signature Approval form for their Department ID(s), but only those listed as approved to sign will be able to make any updates or changes to the form in the future.

Instructions for filling out the Financial Signature Approval form:

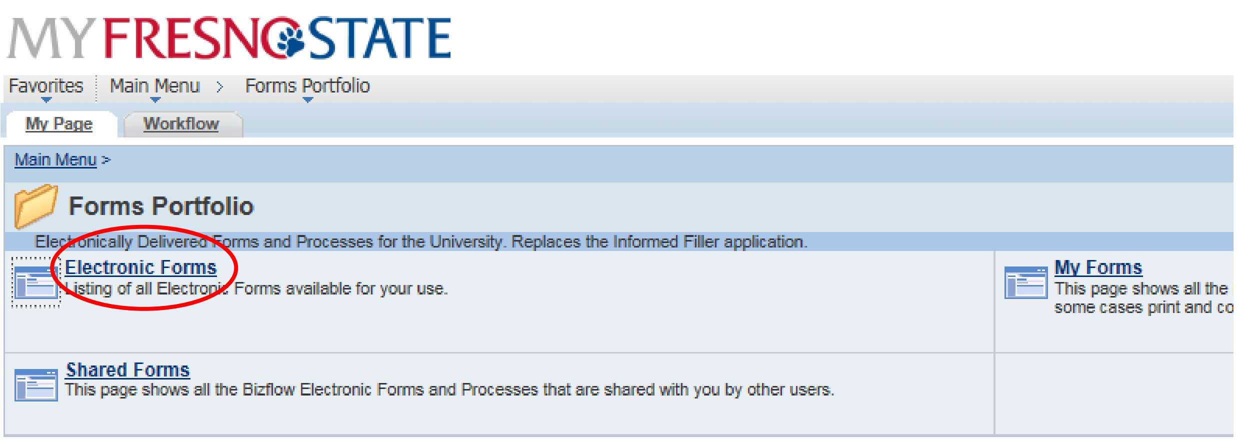
1) At the My Fresno State portal, sign in with your login and password.
   https://my.fresnostate.edu/psp/mfs/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST



2) After logging into My Fresno State, click on the **Forms Portfolio** link, on the left under My Menu.



3) After clicking on the Forms Portfolio link, then click on **Electronic Forms** link.



4) After clicking on Electronic Forms, then click on **Financial Signature Approval** link, found under the Finance section.

Forms Portfolio

Click the checkbox next to all the items you want to appear on your start page.

Request a new item or request security to an existing item.

★ Recommended

Check All   Uncheck All   Save   Cancel

Help Documentation

☑	★	How to use the Electronic Forms in Forms Portfolio	PDF Form	This is a how-to guide for working with the electronic forms available in the Forms Portfolio in My Fresno State.	Details...

Employee

☑	★	Business Traveler Account	Electronic Form	The Business Traveler Account Action Request is used to activate or terminate Business Traveler Account enrollment. The enrollment can either be for an employee as a Traveler, or for an employee as a Travel Arranger.	Details...
☑	★	Travel Application (Domestic and International)	Electronic Form	The Travel Application form is used to submit applications for travel for both Domestic and International travel.	Details...
☑	★	Travel Expense Claim	Electronic Form	The Travel Expense Claim form is used to submit a request for reimbursement for travel expenses.	Details...

Finance

☑	★	Adjusting Budget Journal (ABJ)	Electronic Form	The Adjusting Budget Journal is used to transfer budget funds from PeopleSoft accounting chartfield location to another.	Details...
☑	★	Departmental Deposits	Electronic Form	Departmental Deposits are intended for departments with twenty deposits or less and/or less than $5000 in a fiscal year.	Details...
☑	★	Direct Pay & Hospitality Approval	Electronic Form	The Direct Pay and Hospitality Approval Form is used to request a check payment to an Vendor, Employee, or Student.	Details...
☑	★	Financial Signature Approval	Electronic Form	Authorized Signature form and approvals for Financial Services. Identifies departmental signers for	Details...
☑	★	Petty Cash Fund / Change Fund Authorization	Electronic Form	Petty Cash authorization form for creating and funding Petty Cash Funds, and identifying or changing the fund custodians.	Details...
☑	★	Petty Cash Voucher	Electronic Form	Petty Cash Voucher for payment to vendors.	Details...
☑	★	Purchase Alteration	Electronic Form	Alterations to existing requisitions	Details...
☑	★	Purchase Requisition	Electronic Form	Requisition to purchase goods and services	Details...
☑	★	Request for Billing	Electronic Form	Request for Billing	Details...
☑	★	Stockroom Requisition	Electronic Form	Requisition to purchase stockroom goods and services	Details...
☑	★	Transfer of Operating Revenue and Expenses (TOE)	Electronic Form	The Transfer of Operating Expenses form is used to request accounting changes for revenue and expenses. The Accounting Office makes the appropriate journal entries in PeopleSoft based on this request form.	Details...
☑	★	Transfer of Payroll Expenditures (TOP)	Electronic Form	The Transfer of Payroll Expenditures form is used to transfer payroll expense transfers associated with an employee to different PeopleSoft Chartfields. It can only be used for employee expenses.	Details...
☑	★	Trust Fund Agreement Form	Electronic Form		Details...
☑	★	Trust Fund Approval	Electronic Form		Details...

5) The following Financial Signature Approval form that needs to be filled out will appear. See the next page for instructions on how to fill out the form.

FRESNO STATE

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Financial Transactions Signature Approval

Department Information

Dept ID#: 41409

Department Name: Mail,Warehouse & Property Svcs

VP/Provost: Clinton Moffitt

Fiscal Responsible Manager: Brian Cotham

Primary Approver

Person listed as Primary Approver will be the primary person to review and approve all financial transactions for this Department ID.

Brian Cotham

Secondary Approvers

Persons listed as Secondary Approver will be able to review and approve financial transactions for this department id.

Secondary Approvers to Add

Clinton Moffitt Remove Row

Thomas Siechert Remove Row

Add a new row

Submit and Print the Form

Instructions to fill out the Financial Signature Approval form:

- Enter the Org ID into the **Dept ID#** field and then “tab”. You must fill out a separate form for each Org ID you have associated with your department(s). The Org ID is a part of the PeopleSoft chartfield that defines what department you are.
- The **Department Name**, **VP/Provost, and Fiscal Responsible Manager** will automatically fill in depending upon the Org ID you entered into the Dept ID field.
- Under **Primary Approver** field enter the name of person authorized to sign for all financial transactions for the associated Dept ID#. To enter the Primary Approver, just click in the empty box which will bring you to a search box to look up employees by name, email address, or employee ID, and then click on the person you want to select. The Primary Approver will be the person to receive all electronic notifications and approvals for any electronic financial transactions that will be launching in the near future (travel, purchase requisitions, and purchase alterations).
- Under **Secondary Approvers,** be sure to list at least one **Secondary Approver** to handle approving of financial transactions when the **Primary Approver** is out of the office. To add a **Secondary Approver**, just click in the empty box which will bring you to a search box to look up employees by name, email address, or employee ID, and then click on the person you want to select.
- Click on **Add a New Row** to add additional person(s) as **Secondary Approver**.
- After adding all persons that are authorized to sign, then click on **Submit and Print the Form**
- Be sure to open and print the pdf file. You can also save a copy of the unsigned Financial Transactions Signature Approval form (pdf file) to your computer at this time if needed.
- You must print the form and have all authorized persons sign the form and then send the hard copy form with all signatures to Procurement at Mail Stop JA111.
- When clicking the **Submit and Print the Form** button, the electronic form will also electronically route to the **Fiscal Responsible Manager** and then to the **VP/Provost** for electronic approval of the form.
- The new **Financial Transactions Signature Approval** form process is not complete until both the form is electronically approved and the hard copy form with signatures is sent to Procurement.

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Financial Transactions Signature Approval

Bizflow Process ID: 8788
Department: 41409 - Mail,Warehouse & Property Svcs

Your form has been completed and saved into Bizflow. You can view and print it at any time by going to the "Bizflow Workflow" link on the My Fresno State page.

This form will be automatically sent to the VP/Provost for the department selected for approval. Once approved it will be sent to Financial Services for tracking. Please print the form on paper using the "Print" button below, obtain the appropriate signatures on the form, and send the completed form to the mail stop shown on the form.

Re-Print Form

Instructions for Electronic Approvals of the Financial Signature Approval form:

The Fiscal Responsible Manager and the VP/Provost will need to electronically approve all Financial Signature Approval forms for Department(s) (Org ID's) that fall under their supervision. To approve electronically, the Fiscal Responsible Manager and the VP/Provost, can:

- Click on the link in the email that they will receive notifying about the needed approval
  Or
- Go to Myfresnostate.edu, login, click on Forms Portfolio, then click on My Worklist. The My Worklist will show any electronic forms, including Financial Signature Approval forms that need action. The electronic forms can be put into alpa order by clicking on "Name" when at the worklist.
- When at the Financial Signature Approval form, the approver can select: "Reviewed Changes" or "Return for Corrections" or "Re-Print Form".
- If the approver agrees with the form and wishes to approve the form, then select, "Reviewed Changes".
- The approver will then need to click on "Send" in the next screen that opens. The process is not approved and completer until the approver clicks on "Send".

Contact Brian Cotham at x2893 or bcotham@csufresno.edu if you have any questions or need assistance with the Financial Transactions Signature Approval form