OBJECTIVES OF THE TRAINING

• To understand the need for establishing an account profile.
• How to properly fill out an account profile form.
• Where to find account profile form.

http://www.pvamu.edu/pages/2279.asp
Essential Definitions

- **Account Profile** – describes an account, establishes signature authority, and routing.
- **Routing** – the electronic signature path.
- **Source of Income** – how will the account be funded?
Essential Definitions Continued

- Account Manager – the person responsible for the account, will be a signer.
- Creator – the person creating documents on the account (EPA, DBR, Requisitions).
- Signer – the person approving documents on the account.
Account Profile Form

• Provides important information about an account.
• Needed to create new accounts.
• Needed to update existing accounts.
• Used to grant access to FAMIS/Canopy
When do you complete an Account Profile Form?

- You need a new account established
- You need to change/add creators or approvers on an existing account.
- You need an existing account deleted (must have a zero balance).
How do you complete an Account Profile Form?

• Fill in the appropriate blanks.
• Make sure you complete the reason, purpose, and expenditure restrictions.
• Only check one source of income.
• Get required signatures.
Completing the Profile

• New or Existing Account – place an X on the appropriate line to indicate whether the account is new or existing.
• The Account Title – enter the title of the account.
• Reason for the update – why are you completing the account profile, what updates need to be made?
Completing the Profile Cont.

• Date – enter the current date.
• Account Number – If the account exist enter the account number. The account number should be entered on both pages.
• Account Department – enter the department the account belongs to.
• Code - enter the department code if known. You may leave the code blank.
Sections and Content

• Purpose – provide the purpose for establishing the account. It should adequately describe the reason the account is being established.

• Questions – answer each yes or no question.
• Source of Income – check the appropriate funding source. Only one source of income should be checked. If Transfer from Another Acct or Other is selected, a description must be provided.

• Expenditure Restrictions – enter account restrictions other than all funds are to be expended within the statutes of the state.
Sections and Content Cont.

- Account Manager – enter the account manager name, title, universal identification number, phone number, and email address.
- The account manager’s signature is required.
- Print the account manager’s name (responsible person).
• Authorized Account Manager Signatures – are required, there must be signatures from at least two individuals.

• Other signatures – obtain signatures of the department head, the dean or other division head, the appropriate vice president, and the Vice President for Business Affairs.
Sections and Content Cont.

• Blanket Routing For All Documents – if the creators and approvers for all documents are the same then only Section A should be completed.

• Other Routing – if the creators and approvers are different for different types of documents, complete the appropriate sections.
Sections and Content Cont.

- **Creator** – creates documents to be reviewed, signed, and processed (purchase requisitions, budget transfers). There must be at least two creators.
- **Signer** – reviews and approves created documents. There must be at least two signers/approvers.
- The creator and signer can’t be the same.
Account Profile Rejected

• No purpose or purpose not clearly stated.
• Source of Income not checked or explained.
• No approval by VPBA.
• Creator is also approver.
Summary

- An account profile needs to be completed to establish a new account, and to update or delete an existing account.
- Fill in the appropriate blanks.
- Make sure you complete the reason, purpose, and expenditure restrictions.
- Only check one source of income.
• Get required signatures.
• The form can be found at:
  http://www.pvamu.edu/pages/2279.asp
Contact Information

For more information, questions, or concerns please contact:

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