Delegation of Approval Authority Letter  [http://cfaesfinance.osu.edu/forms]
This form is required. Please follow the above link or navigate to the “Forms” page of the Business Office website to view the letter and review the instructions. By signing and returning this form you are delegated the authority to receive approval access for various transactions on behalf of your office. Please return page 2 of this letter with your signature to Rachel Crusey in the Business Office.

eRequest Approver Access (Financials System Access Form)  [http://cfaesfinance.osu.edu/forms]
This form is required. Please follow the above link or navigate to the “Forms” page of the Business Office website to view form. On this form you will note that there are five (5) online courses that must be taken in order for you to be able to approve transactions for your unit. You need to take these courses within your first two weeks as Unit Director. Once completed you should select to add access to: PeopleSoft, eReports, eRequest Approver and eRequestor.

Optionally there are additional classes you can take to become a Travel System approver or Invoice Approver for your office.

Local Checking Account Signatory
Please contact your local bank to remove the previous County Director and add yourself as signatory on your local checking account.

Purchasing Card Forms
If your office has a purchasing card you are required to update these two forms and submit to the purchasing card Reallocator in your Regional Office.
1. OSU Extension Purchasing Card Unit Approver Form  [http://cfaesfinance.osu.edu/forms]
2. OSU Extension Purchasing Card User Agreement Forms  [http://cfaesfinance.osu.edu/forms]
Please follow the above link or navigate to the “Forms” page of the Business Office website to view form.

Additional Resources
For additional help in your Role as a new Director, see the New Director Training on the Business Office Policies and Procedures Page.  [http://cfaesfinance.osu.edu/training]

New Employee Fiscal and New Director Training
2 hr training part 1  1 hr training part 2

If you have any questions regarding these forms please contact Jesse Buxton (buxton.26@osu.edu)