Guidelines for Requisition Approvers

For complete instructions, see the online tutorial at: www.isu.edu/tigeri/training/reqapproval.

As of July 1, 2009, all ISU requisitions will be prepared in Banner by designated “ReqMasters” and routed as illustrated here:

**Roles & Responsibilities**

**Account Director**
- Communicates request to ReqMaster (or delegates the responsibility to communicate a request)
- Checks that budget is adequate for request
- Verifies that all information is correct; checks to see that proper Index and Commodity Codes have been used
- Approves in a timely fashion

**ReqMaster**
- Prepares request in accordance with instructions from requestor
- Follows all Purchasing policies and guidelines

**UBO or Grants Accounting (Reviewer)**
- Checks to see that the request is properly prepared and in accordance with all financial considerations
- Reviews and approves request in a timely fashion; communicates with Account Director if questions arise
- Approves requests only when they are the designated “Next Approver” (except in case of emergency as detailed below)

**Purchasing**
- Processes requests as quickly as possible and in accordance with all State and University standards
- Communicates with ReqMasters and/or Account Directors as necessary

**What to Do in Case of Absences and Emergencies**

There are no proxies set up in Banner for Requisition Approval in the way that they are set up for Time Approval.

**Expected Absences:** If Account Directors know that they will be absent and expect that requests for accounts they have responsibility for may need to be processed while they are gone, they will notify Dane Bohman, the Finance Functional Technician (bohmdane@isu.edu), who will temporarily set the appropriate Reviewer as the sole approver on accounts for which expenses may occur.

**Emergency Approvals:** In cases of emergency when an Account Director is absent and arrangements have not been made in advance, a ReqMaster or other department personnel may notify the appropriate Reviewer (UBO or Grants Accounting). On a case-by-case basis, the Reviewer will decide whether to step in and authorize an expense, or whether to wait for the Account Director’s return.

**Getting Help:** For problems with completing Requisition Approvals, please contact the IT Service Desk at 282-4357(help).