

Banner Approval Queue Setup Form

[Click Here for Instructions](#)

Business Services
 Phone: (406) 243-2940
 Fax: (406) 243-4929

For: Invoices Purchase Orders Requisitions
 New Approval Queue
 Modify/Update Remove Approval Queue ID: _____

Department Name:	Request Date:
Contact Name:	Contact Phone:
Contact Email:	Banner Org #:

Our department intends on using the following approval method: (please check one)

ELECTRONIC: Document approval will be completed entirely using electronic approval queues in Banner. Documents entered into Banner by department staff will be electronically forwarded to a high level authority within the Department upon completion. The high level authority (Dean/Director/Chair/Budget Personnel) **DOES** plan to access Banner Finance on a daily basis to approve documents. (If not go to the next method)

In the following table please list the individuals who will be processing and approving documents for your department:

Name	Position	Processor (Yes or No)	Approver (Yes or No)	Approval Limit	Banner User_ID

ELECTRONIC WITH MANUAL INTERVENTION: Documents will be entered into Banner by department staff within the department. The source document will be sent manually to the Higher Level Authority for review and signature (initials and date of review). The high level authority (Dean/Director/Chair/Budget Personnel) **DOES NOT** plan to access Banner Finance on a daily basis to approve documents. **[By checking this option the department staff entering documents in Banner has implicit approval of the transaction. For audit purposes source documents must be reviewed and signed off by a higher level authority either before or after entry in the Banner Finance System within a reasonable time frame.]**

If you're handling approvals using the electronic with manual intervention method, please list the individuals who will be processing documents for your department as well:

Name	Position	Processor (Yes or No)	Approver (Person is Implicit)	Approval Limit	Banner User_ID

If a more specific approval queue is necessary, (i.e. the ability to track specific expenses from an auxiliary fund on a separate queue) please use the space provided below and outline the requirements in detail. If additional guidance on this matter is necessary, please call Business Services - Systems personnel at x2940. – **Route form to Business Services thru campus mail or fax.**

Dept. Authorization:

_____ (Chair / Director Signature) (Print Name) _____ (Date)

_____ (Dean / Executive Officer Signature) (Print Name) _____ (Date)