Banner Approval Queue Setup Form
For Requisitions

BUSINESS SERVICES
The University of Montana - Missoula

Department Name: _____ Request Date: _____
Contact Name: _____
Contact Email: _____ Contact Phone: _____
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 clerical personnel 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 on accessing Banner Finance on a daily basis to approve documents.

____ ELECTRONIC WITH MANUAL INTERVENTION: Documents will be entered into Banner by clerical personnel 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 on accessing Banner Finance on a daily basis to approve documents. **[By checking this option the clerical person 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.]**

In the following table please list the individuals who will be approving Requisitions for your department. **If you're handling approvals using the electronic with manual intervention method, please list the individuals who will be processing invoices for your department as well.** Also, please list the approval limits for the individuals.

Name	Position	Processor (Yes or No)	Approver (Yes or No)	Approval Limit	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.**

_____
_____
_____
_____

Dept. Authorization: _____
(Chair / Director)

_____
(Dean / Executive Officer)