

New Accounting Unit Request Form

Sponsored Program Accounting

Use this form to request a new 6 digit Sponsored Program Accounting (SPA) managed accounting unit.
If a different AU type is needed use this [form](#).

Accounting Unit Type:

LU/PTAP: (Where applicable)

Person Responsible (PI):

Person Responsible (PI) email:

Department Name and #:

(this is the department to which the AU will be assigned)

Departmental administrative support contact for SPA AU email(s):

General notes and comments, if any:

Minimum Required Documents for AU Set Up:

Lakeside Campus

PTAP Form - AU set up for SPA
Grant Agreement
Budget - account code breakdown
Budget - from proposal with itemized justification
Physical check, if rec'd, sent to SPA via interoffice mail
Federal Award Number & CFDA Number *
(In writing from Sponsor)
Grants from Non-Gov't Sponsors Form*
Cost-Share Request Form*
Cost-Share Budget - with account code breakdown*

University Funded (1045xx) (1047xx) (1048xx)

Signed letter or contract
Budget
Net assets transfer JE request
OR
Support showing JE already processed

Health Sciences Campus

Federal & Non-Fed Grant; Federal Clinical Trial & Contracts

Portal Documents (including):
Routing forms
Budget
Cost-Share approval *
Indirect cost waiver*
Grant agreement OR
Clinical trial agreement & IRB approval letter
Physical check;
if rec'd, sent to SPA via interoffice mail

Industry Clinical Trial

Contract (with study budget)
IRB approval letter
Budget & copy of start-up check, with physical check sent to SPA via interoffice mail

University Funded (103xxx) (1034xx) (1036xx - 1039xx) (1046xx)

AU set-up & upload spreadsheet
Completed budget transfer
For RFCs, portal set-up package required

University-wide

Advance AU

Advance Account Authorization Form
Documentation showing Awardee's intent to fund. e.g. letters of intent, emails, budget requests, etc.

Gift (2xxxxx)

Donor award letter
Allocation request form
Physical check, if rec'd, sent to SPA via interoffice mail

OR

documentation confirming University deposit check or eft

University Funded (1041xx) (107xxx) (1071xx)

Signed letter or contract
Budget
Net assets transfer JE request
OR
Support showing JE already processed

*if applicable

Revised 6/10/2022