

Request General Ledger (GL) Viewing Access / Delegate Spending Authority Form

Purpose of this form - To delegate GL account access and / or spending authority to a UPEI faculty or staff member for a specific GL / Project account. This form is prepared in accordance with the [UPEI Spending Authority Policy](#).

Start Date	
End Date (if applicable)	

** If this form is being used for a short-term delegation, an end date must be entered above*

New GL Viewing Access / Spending Authority Information

Name	Employee ID	Email Address	GL Access (Y/N)*	Spending Authority (Y/N)**	Approval Limit (\$2,000, \$5,000, or \$100,000) ***

**GL Access required for spending authority*

***Spending authority required to approve payroll hours*

****Spending authority approval limits are set in accordance with the UPEI Spending Authority Policy*

GL Account Details

Cost Centre No.(s)	Project ID (If applicable)	Cost Centre Name(s) / General Notes

Object Code Access Required (please select one)

All Codes (revenue/expense)
 Expense Only
 Non-Salary Expense Only

Account Authority Information

As Account Authority, I understand the implications of approving this request. This setup will enable the user to:	
General Ledger Access	View all budget and actual figures for the GL accounts requested in the above parameters Initiate requisitions and request for payments
Spending Authority	Authorize the expenditure or commitment of University funds Automatically approve all requisitions / request for payments initiated within spending authority limit
By signing this form I acknowledge that the delegate(s) understand their role and responsibilities as they relate to UPEI's policies and procedures, specifically the UPEI Procurement , Spending Authority , and Signing Authority Policies.	
Name	Signature
Employee ID	Date

Once this form is completed and signed, please send a scanned copy to financeforms@upei.ca

Financial Services Office	
Manager Signature	
Date	
Colleague Configuration	
Data Control Signature	
Date Processed	
Notes	