Case Western Reserve University
Accounting Procedure
Speedtype Request Form Instructions
For all Operating SpeedTypes (ie: OPR/INS)

When requesting a new speedtype or a change in an existing speedtype, please fill out the Speedtype Request Form (attached; click paperclip icon to the left of these instructions) according to the following instructions:

- At the top of the form, please select whether you are requesting a new speedtype, or changing an existing one. If requesting a new speedtype, suggest a name that is descriptive (max 30 characters). Please describe what the speedtype will be used for in the REASON/PURPOSE box. If requesting a change to an existing speedtype, be clear about what changes you need to make.

- All fields below the BOLD divider line MUST be filled out

- REQUEST DATE – the date the form is filled out

- REQUESTOR NAME/TITLE – the name of the person filling out the request form and their position title

- DEPARTMENT #/NAME – Requestor's department

- REQUESTOR PHONE NUMBER/E-MAIL - contact information for the person filling out the form

- ANY RESTRICTIONS (drop-down box: yes/no) – Are the funds in the speedtype restricted or unrestricted?

- If yes, explain the restrictions. If no, type N/A

- DESCRIPTION OF INCOME – not all speedtypes will have income; if there will not be any, type N/A.

- DESCRIPTION OF EXPENSES – explanation of the types of expenses that will be booked to this speedtype.

- RECONCILER NAME/TITLE – this is the individual responsible for managing the day to day activity within the speedtype and reviewing the applicable reports on a monthly basis

- ROLLUP DEPT #/NAME – where the speedtype activity will roll up on the Budget Performance Report

- Location Code – the campus mail code associated with the speedtype

At the bottom of the form is a section for the Department Finance Manager's approval. Fill in the name and title of the Finance Manager in the appropriate boxes, then the manager will check either approved or not approved and sign and date the request form. Instructions for inserting an electronic signature are included on the form.

Once the form has been completed and approved by the Department Finance Manager, click on the "Submit by E-mail" button in the top right-hand corner of the form; this will open an email in Outlook pre-addressed to General Accounting, and automatically attach the form. All requests should be submitted electronically.

Once the form has been received by General Accounting, it will be reviewed and any questions addressed to the Requestor. The BudgetOffice will approve as needed. Upon approval, the speedtype will be created and any applicable budget entries will be recorded by the Budget Office. Once the setup is complete, the requestor will be notified via e-mail.