

DEARBORN ADMINISTRATIVE GUIDE

Section: Business and Financial Services  
Subject: Account Establishment/New Account  
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A new chartfield combination (previously called account) is established by sending the Director of Financial, Budget & General Services a memo containing the following information:

1. Purpose or use of the chartcom.
2. Time period for which the chartcom is needed.
3. Source of funds for the chartcom.
4. Type of expenses that will be incurred.
5. Name of chartcom director, additional authorized signers and the statement of activity recipient. The chartcom director will receive the payroll registers.

If the new chartcom is a gift account, the memorandum must be sent to the Director of Development and copied to Financial & Budget Services.

Any Federal, State, Industrial, Foundation, quasi-governmental agency chartcom establishment requests must be processed through the Office of Research and Sponsored Programs following the procedures listed in Dearborn Administrative Guide Section [506.2](#) - Grants and Contracts/Proposals for External Funding.

Once the new chartcom is established, the requesting department will be notified by the Dearborn Financial Services Office.

**Policy**

The Director of Research and Sponsored Programs coordinates the establishment, administration and termination of the following chartcoms:

1. Sponsored project grant accounts, including federal, state, foundation and corporate grants and contracts. The Division of Research Development and Administration and the Office of Financial Operations in Ann Arbor have primary authority over the establishment of these accounts. The Director of Research and Sponsored Programs represents the Dearborn Campus and works closely with these offices in establishing grant accounts.

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2. Campus Grant and Faculty Research Grant accounts, awarded by the Research Support Board and the Office of Research and Sponsored Programs.

The Director of Research and Sponsored Programs reviews and approves all proposals for sponsored programs on behalf of the Dearborn Campus, and works closely with Institutional Advancement and Development officers to review and keep track of gift proposals, as well.

### **Procedure**

The policies and procedures for submitting a proposal on the Dearborn Campus are described in Dearborn Administrative Guide Section 506.2. Written notice by the sponsor or the awarding committee is usually sufficient to trigger the establishment of a new chartcom.

Additional backup documentation and copies of documents and correspondence may be requested to assist in establishing a new chartcom. The Director of Research and Sponsored Programs will work with the Director of Financial & Budget Services and Institutional Advancement in the case of contributions, to determine the nature of new accounts. Background documents (letters of transmittal, proposal, etc.) are important in making these decisions.