Potsdam
STATE UNIVERSITY OF NEW YORK

IFR Account Request Form
Business Affairs Office

This form is used to establish a new or update an existing IFR account. Return the completed and signed form to Phyllis Charleson (charlepc@potsdam.edu).

Requester Information

Contact Name:

Department:

IFR Account Information

1. Action Requested: Establish New Account   Update Existing Account   Inactivate Account

2. Account Name (32 character max.)

3. If updating or inactivating account, provide Account Number:

      Reason for the update or inactivation:

4. Is there a fee associated with this account?

      Yes (Attach proof of approval with request)   No

5. In detail, describe the program activity associated with this account? What goods and/or services will be provided? What is the benefit of the program?

6. Who will provide the revenues received by this account?

Foundation

Alumni Association

College Auxiliary Services

Student Association

Research Foundation

Student Account

Other (Please Specify Below)

Revised: 06/30/22

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Estimated Year 1 Budget

Estimated Revenue
Less:
   Administrative Overhead (5.6%)

   Maintenance Overhead (8.7%)

Attach justification for administrative and/or maintenance overhead rate waiver if applicable

Net Revenue

Estimated Personal Services
   PSR Instructional

   PSR Non-Instructional

   Temporary Service

   Fringe Benefit Cost (63.86%)

   Temporary Service - Student

Total Salaries and Benefits

OTPS
   Supplies

   Travel

   Equipment

   Contractual

   Recharges

   Other

Total OTPS

Total Operating Expenditures

Surplus/(Deficit)

Authorization

Account Owner

Signature: _____ Print Name: _____ Date:

Dean/Director

Signature: _____ Print Name: _____ Date:

Provost/Vice-President

Signature: _____ Print Name: _____ Date:

Director of Budget and Financial Reporting

Signature: _____ Print Name: _____ Date:

Vice-President for Administration & Finance

Signature: _____ Print Name: _____ Date:

Central Finance Use Only

Revenue Class _____	Banner Detail Code _____	Major Project _____
NACUBO Function _____	Account Number _____	UBIT _____
Administrative Overhead _____	Maintenance Overhead _____	

Revised: 06/30/22