

DELEGATION OF AUTHORITY FORM INSTRUCTIONS

Overview

CSU Long Beach provides Signature Authority to certain individuals to approve various transactions, based on their "Level" in the organization. Within each department, the Dean or Associate Vice President (Level 3) is responsible for the overall operations of the department and may assign signature authority to certain employees in compliance with Signature Authority policy. Signature authority is granted by Business Unit, then by Department or Fund.

The Delegation of Authority Form is required to add or update authorization for certain Departments and/or Funds. The routing of the form is through email and will ensure that the Requestor, Delegation Approver and FISCOA (fiscoa@csulb.edu) all have electronic copies of the Delegation of Authority Form. This document further describes the process for accessing and completing the Delegation of Authority Form.

Common Questions

Where can I find the CSULB Signature Authority Guideline?

The CSULB Signature Authority Guideline can be found at http://daf.csulb.edu/admin_guidelines/sig_auth.html.

This guideline is for the LBCMP – CSU Long Beach, LBFDN – Research Foundation, and LB40R – 49er Foundation Business Units.

Who approves the Delegation of Authority Form?

The Requestor must route the form to a person who is authorized to approve the delegation request. Delegation Approver's must be Level 3 or above or be a specified designee. If a Level 3 is specified on the form, they are permitted to approve forms not only for granting themselves to Departments and/or Funds within their area of responsibility, but also granting for Level 4&5's within their area of responsibility.

Note: For the Research Foundation, LBFDN, the Senior Director of Sponsored Programs, has been authorized to be the Delegation Approver for all ORSP related Funds.

Do we need to specify Level 1 and Level 2's on the Delegation of Authority Form?

Level 1 is not required and Level 2's are only required on newly created Departments, not Funds. It is assumed Level 1 has authority for all Departments and/or Funds within all Business Units, and Level 2 will have authorization for all Departments within their Division (DOA is at the Department only). However, a Signature Authorization Form for Financial & Human Resources Transactions must be completed and on file for both Level 1 & 2.

Can I add attachments to the Chartfield Request Form?

Yes, you can add attachments to the Chartfield Request Form.

What software is required to submit the form?

The workflow submission process on the Delegation of Authority Form requires Adobe Acrobat Professional.

Where to send the Form?

Completed forms, or questions regarding form completion or submission, should be sent to fiscoa@csulb.edu.

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Completing & Submitting the Delegation of Authority Form

Once the Delegation of Authority Form has been accessed, the next step is to complete the Form.

Request Type

In this section, select the Delegation of Authority Request Type.

-
- Request Type** Add a new Fund or Department to Delegation Authority Update Existing Delegation Authority
 Replace and Inactivate Delegation Authority Inactivate Delegation Authority
-

Processing Step / Field Name	Screenshot / Description
Add a new Fund or Department to Delegation Authority	Select to add a new fund or department to the Delegation of Authority. This is used to assign employees to newly created funds and/or departments.
Replace and Inactivate Delegation Authority	Select to provide the same Delegation of Authority as the employee to be inactivated. This is used if an employee is replacing someone.
Update Existing Delegation Authority	Select to update existing Delegation of Authority. This is used if the employee is already set up in DOA and funds and/or departments need to be added or removed.
Inactivate Delegation Authority	Select to inactivate Delegation of Authority. This is used if the employee no longer has DOA for funds and/or departments.

Business Units

In this section, select the Business Unit in which the Delegation of Authority should be set up in.

-
- Business Units** LBCMP LBFDN LB49R
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Processing Step / Field Name	Screenshot / Description
LBCMP	CSU Long Beach
LBFDN	Research Foundation
LB49R	49er Foundation

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The following sections are applicable to the selected Request Type

Add a new Fund or Department to Delegation Authority

This section will be enabled when Add a new Fund or Department to Delegation Authority is chosen in the Request Type section. This is used to assign employees to newly created funds and/or departments.

Add a new Fund or Department to Delegation Authority - Specify Employee Name(s) **Type:** **Value:**

Provide Delegation Authority to:

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Processing Step / Field Name	Screenshot / Description
Type:	Select fund or department. Required.
Value:	Enter the 5-digit fund or department value. Required.
Provide Delegation Authority to:	Enter the name(s) of the person(s) to provide Delegation Authority to. Required. Note: Level 2's are not required when this is a Fund request, only for Departments.

Replace and Inactivate Delegation Authority

This section will be enabled when Replace and Inactivate Delegation Authority is selected in the Request Type section. This is used if an employee is replacing someone.

Replace and Inactivate Delegation Authority - Provide the same Delegation Authority as employee to be inactivated.

Inactivate: Name Dept ID

Replaced by: Name Dept ID

Processing Step / Field Name	Screenshot / Description
Inactivate: Name	Enter the name of the person to inactivate. Required.
Inactivate: Dept ID	Enter the Department ID of the person requiring inactivation. Required.
Replaced by: Name	Enter the name of the person that is replacing the person to be inactivated. Required.
Replaced by: Dept ID	Enter the Department ID of the person replacing. Required.

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Update Existing Delegation Authority

This section will be enabled when Update Existing Delegation Authority is chosen in the Request Type section. This is used if the employee is already set up in DOA and funds and/or departments need to be added or removed.

Update Existing Delegation Authority - Update Delegation Authority for specified employee.

Name Dept ID

Departments - If only a Division or Sub-division is entered, then all of its departments will automatically be included.

Select Type	Division Name	Sub-Division	Dept ID	Dept ID	Dept ID	Dept ID	Dept ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Select Type	Fund	Fund	Fund	Fund	Fund	Fund	Fund	Fund	Fund	Fund	Fund	Fund
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Processing Step / Field Name	Screenshot / Description
Name	Enter the name of the person requiring updates. Required.
Dept ID	Enter the Department ID of the person requiring updating. Required.
Select Type	Select type of update, Add or Remove. Required.
Division Name	Select the Division to add or remove. Optional.
Sub-Division	Select the Sub-Division to add or remove. Optional.
Dept ID	Enter the Department ID(s) to add or remove. Optional.
Fund	Enter the Fund(s) to add or remove. Optional.

Inactivate Delegation Authority

This section will be enabled when Inactivate Delegation Authority is chosen in the Request Type section. This is used if the employee no longer has DOA for funds and/or departments.

Inactivate Delegation Authority - Specify employee who no longer require Delegation Authority.


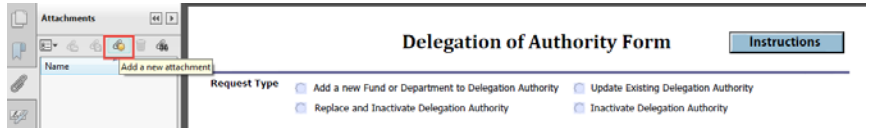

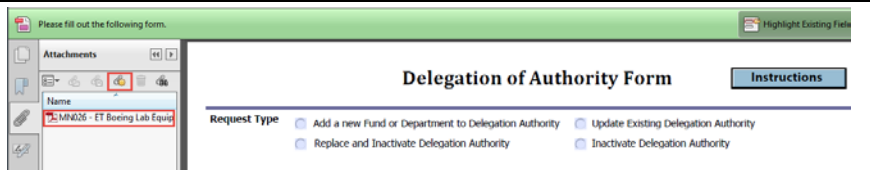
Name to Inactivate: Dept ID

Processing Step / Field Name	Screenshot / Description
Name to Inactivate:	Enter the name of the person to inactivate. Required.
Dept ID:	Enter the Department ID of the person to inactivate. Required.

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Adding Attachments

Attachments may be added if applicable.

Processing Step / Field Name	Screenshot / Description
Click the paper clip icon	 <p>The screenshot shows the top portion of the 'Delegation of Authority Form'. On the left side, there is an 'Attachments' section with a paper clip icon highlighted by a red box. The main form area contains the title 'Delegation of Authority Form' and an 'Instructions' button. Below the title, there is a 'Request Type' section with four radio button options: 'Add a new Fund or Department to Delegation Authority', 'Update Existing Delegation Authority', 'Replace and Inactivate Delegation Authority', and 'Inactivate Delegation Authority'.</p>
Click the new attachment icon	 <p>This screenshot is similar to the previous one, but the 'Add a new attachment' icon (a plus sign) in the Attachments toolbar is highlighted with a red box. The rest of the form content remains the same.</p>
Select the file to attach	 <p>The screenshot shows the 'Add Files' dialog box open over the 'Delegation of Authority Form'. The dialog box displays a list of files in a folder named 'Fund'. The file 'MN026 - ET Boeing Lab Equip Relocation' is selected and highlighted. The 'Open' button at the bottom right of the dialog box is highlighted with a red box. The background form shows the 'Attachments' section with the 'Add a new attachment' icon highlighted.</p>
Attach additional files	 <p>The screenshot shows the 'Delegation of Authority Form' with the 'Attachments' section now containing one file: 'MN026 - ET Boeing Lab Equip'. The file name is highlighted with a red box. The rest of the form content is the same as in the previous steps.</p>

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Requestor

This section must be completed by the person requesting adds or updates to department and/or fund delegations for the Delegation of Authority request process to function correctly.

Requestor

Requestor: Date: Comments:

Requestor Email:

Processing Step / Field Name	Screenshot / Description
Requestor:	Enter the Requestor's name.
Date:	The date the Requestor completed the form.
Requestor Email:	The Requestor must include their email address. This is used so the Applicant can be notified during the routing and approval process for the form.
Comments:	Include any remarks or comments the Requestor has regarding the request.

Delegation Approval

This section must be completed by the person approving the requested adds or updates to department and/or fund delegations for the Delegation of Authority request process to function correctly.

After the Requestor section has been completed, the Delegation Approver must electronically review the form and indicate whether they approve the request or changes are required by completing this Delegation Approval section. Delegation Approver's must be Level 3 or above or be a specified designee.

Level 3's, are permitted to approve forms granting their own Delegation Authority for Departments and/or Funds within their area of responsibility, but also granting for Level 4&5's within their area of responsibility. The Senior Director of Sponsored Programs is authorized to approve Delegation of Authority for all ORSP related Funds in the LBFND – Research Foundation Business Unit.

Delegation Approval By checking this box, I approve the listed individual(s) to be the designated persons for the Financial and Human Resources.

Delegation Approver: Date: Comments:

Delegation Approver Email:

Processing Step / Field Name	Screenshot / Description
Delegation Approval. By checking this box, I have reviewed and approve this chartfield request.	The Delegation Approver must select the checkbox certifying that they have reviewed and approve the Delegation of Authority request.
Delegation Approver:	Enter the Delegation Approver's name.
Date:	The date the Delegation Approver approved the form.
Delegation Approver Email:	The Delegation Approver must include their email address. This is used so the Delegation Approver can be notified during the routing and approval process for the form.
Comments:	Include any remarks or comments the Delegation Approver has regarding the request.

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FISCOA

This section must be completed by the FISCOA administrator processing the requested adds or updates to department and/or fund delegation for the Delegation of Authority request process to function correctly.

FISCOA

Name:

Date:

Comments:

Processing Step / Field Name	Screenshot / Description
Name:	Enter the FISCOA administrator's name.
Date:	The date the FISCOA administrator processed the form.
Comments:	Include any remarks or comments the FISCOA administrator has regarding the request.

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WORK FLOW SUBMITTAL

There are several points in the process where email notifications will need to be sent. The table below explains the various workflows.

Workflow Submittal - The DOA form attached to the requestor and delegation approver's "csulb.edu" e-mail is an acceptable method of authentication, so signatures are not required as long as both e-mail receipts are sent to the FISCOA.

Requestor sends form to the Delegation Approver and FISCOA is copied for authentication.

Send

TIMESTAMPS Requestor: _____ Delegation Approval: _____ FISCOA: _____ Version: 1.0

Processing Step / Field Name	Screenshot / Description
Requestor	<div data-bbox="532 594 1468 625" style="border: 1px solid black; padding: 2px;"> <p>Requestor sends form to the delegation approver and FISCOA is copied for authentication.</p> <p style="text-align: right;">Send</p> </div> <p>After the form has been completed, certified, and dated by the Requestor, the Requestor will select "Requestor sends form to the Delegation Approver and FISCOA is copied for authentication" from the pull-down menu (default option), and then click on the "Send" button. This will create an editable email with the Delegation of Authority Form attached (pdf file format). The Requestor will add the campus email address of their Delegation Approver in the "To" field. The Requestor and fiscoa@csulb.edu will be automatically included in the cc field.</p> <p>If prompted with the Send Email dialog box, select to use the "default mail application" and then select "Continue".</p> <div data-bbox="526 1276 1188 1747" style="border: 1px solid gray; padding: 10px; margin-top: 20px;"> <p>Send Email ✕</p> <p>How would you like to send this email?</p> <p><input checked="" type="radio"/> Default email application (Microsoft Outlook)</p> <p><input type="radio"/> Use Webmail</p> <p style="margin-left: 20px;">Select ▾</p> <p><input type="checkbox"/> Remember my choice</p> <p style="text-align: right;"> <input type="button" value="Continue"/> <input type="button" value="Cancel"/> </p> </div>

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Processing Step / Field Name	Screenshot / Description
	<p>A draft email will open in your mail application with text similar to the content below, only requiring the "To" recipient to be added to the email. FISCOA will already be added in the cc field.</p> <p>The attached Delegation of Authority form has been completed by <i>[Requestor Name]</i> requesting delegation authority to approve and execute the expenditure of funds and is ready for your review and approval. Detailed instructions on how to complete the process are available by clicking the 'Instructions' button at the top of the attached form page.</p> <p>If you approve this Delegation of Authority request, then complete the following steps:</p> <ol style="list-style-type: none"> 1. Complete the Delegation Approval section at the bottom of the attached form. <ol style="list-style-type: none"> a. Select the approval checkbox. b. Add/Verify your name, date, and email. c. In the comments field, note any updates/changes made to the form for reference purposes. 2. Complete the Workflow Submittal section at the bottom of the attached form. <ol style="list-style-type: none"> a. Select Mail the form to FISCOA. b. Click the 'Send' button on the Delegation of Authority Form. This will automatically attach the form to a new e-mail and create a standard message for FISCOA. c. Click the 'Send' button from your mail client to deliver the mail message to FISCOA. <p>I also copied FISCOA as a substitute for my signature on the form. This email will serve as an acceptable method of authentication for the request.</p> <p>Let me know if you have any questions.</p> <p>Thank you,</p> <p><i>[Requestor Name]</i></p> <p>If the recipient of the email is not the Delegation Approver but needs to authorize the request for internal departmental purposes, the email can be forwarded on to the appropriate level 4 administrator to complete the steps.</p>

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Processing Step / Field Name	Screenshot / Description
Delegation Approval	<div style="border: 1px solid black; padding: 2px; margin-bottom: 10px;"> Send Delegation Approver sends form to FISCOA to update the system. </div> <p>After the Delegation Approver has completed, certified, and dated the form, then the Delegation Approver will select "Delegation Approver sends form to FISCOA to update the system." from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to fiscoa@csulb.edu and copy the Requestor and Approver.</p> <p>If prompted, select to use the default mail application and "Continue".</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="margin-left: 40px;">FISCOA,</p> <p style="margin-left: 40px;">The attached Delegation of Authority form has been completed by <i>[Requestor Name]</i> and approved by <i>[Delegation Approver]</i>. Please process this Delegation of Authority request. This email will serve as an acceptable method of authentication for the approval.</p> <p style="margin-left: 40px;">Let me know if you have any questions.</p> <p style="margin-left: 40px;">Thank you,</p> <p style="margin-left: 40px;"><i>[Delegation Approver]</i></p>
FISCOA	<div style="border: 1px solid black; padding: 2px; margin-bottom: 10px;"> Send FISCOA sends final form to the Requestor and Delegation Approver. </div> <p>After the FISCOA administrator has processed, completed and dated the form, then the FISCOA administrator will select "FISCOA sends form to the Requestor and Delegation Approver." from the pull-down menu, and then click on the "Send" button. This will create an editable email with the form attached. It will be addressed to the Requestor and Approver and copy FISCOA.</p> <p>If prompted, select to use the default mail application and "Continue."</p> <p>A draft email will open in your mail application with text similar to the content below:</p> <p style="margin-left: 40px;"><i>[Requestor]</i>,</p> <p style="margin-left: 40px;">The attached DOA form has been approved by <i>[Delegation Approver]</i>, and your requested delegation of authority has been setup in the CFS PeopleSoft system. Those that have been authorized to make expenditure transactions for the specified funds or departments in the attached form have been copied in this email. For additional details on the CSULB Signature Authority policy refer to: http://daf.csulb.edu/admin_guidelines/policies/sig_auth.html</p> <p style="margin-left: 40px;">Please contact us if you have any questions.</p> <p style="margin-left: 40px;">Thank you!</p>

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Processing Step / Field Name	Screenshot / Description
<p>Optional</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Optional: Route form to co-workers for validation and questions. Send </div> <p>If a user has a question or would like to email the form to a co-worker, then select "Optional: Route form to co-workers for validation and questions." from the pull-down menu, and then click on the "Send" button.</p> <p>This will create an editable email with the form attached. The email will not be automatically addressed as in the other steps, allowing the user to select the appropriate recipients.</p> <p style="padding-left: 40px;">Content:</p> <p style="padding-left: 40px;">I am in the process of completing the attached form and have the following questions:</p> <p style="padding-left: 40px;"><i>Type custom text here</i></p> <p style="padding-left: 40px;">Thank you</p>
<p>Reset Approvals</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Reset workflow approvals Send </div> <p>If you experience an error message or problem in sending the form, the "Reset Workflow Approvals" will clear out the timestamps on the bottom of the form (not clear the entire form) and enable you to start the workflow from the beginning.</p> <p>If you select "Reset Workflow Approvals" you will be prompted to confirm your request with "Do you want to reset the workflow approvals?" Select "Yes" to confirm or "No" to return without changes.</p> <p><i>Note: "Reset Workflow Approvals" option will not be available until the applicant has selected "Send" to submit the form to their administrator for approval.</i></p>