



CHECKLIST FOR FINANCIAL SERVICES TEAMS (FST) MANAGER MEMBERSHIP CHANGES

The FFO/FST Supervisor must immediately communicate all changes in FST Manager Membership.

NEW FST MANAGER NOT YET HIRED - If a new FST Manager has not yet been hired or fully 'certified' upon the departure of a FST Manager, a temporary manager must be appointed.

<input type="checkbox"/>	The temporary manager must be the FFO/FST Supervisor or another 'certified' FST Manager within the Faculty/Unit.
<input type="checkbox"/>	FFO/FST Supervisor must complete and submit the Temporary Changes to FST Manager Membership Form that is available in the "For FFOs" page on the Financial Services website.

NEW FST MANAGER HIRED

<input type="checkbox"/>	FST Manager must register and complete the Banner and Minerva administration courses (GEN 300, FIS 301, and FIS 330) if not already done so. Go to Minerva> Employee> IT Customer Services (ICS) Training Menu> Banner/Minerva training to register for the courses.
<input type="checkbox"/>	FST Manager must register and complete the online course OLC (FIN) 451 – FST Advances and Expense Reports . Go to Minerva> Employee> IT Customer Services (ICS) Training Menu> Online Training to register for the course.
<input type="checkbox"/>	FST Manager should refer to the Research Administration Network (RAN) website to review the research related information and must complete and submit the InfoEd Access Request Form – View only . The form is available in the "For FFOs" page on the Financial Services website.
<input type="checkbox"/>	FFO/FST Supervisor must complete and submit the Finance Information System (FIS) Authorization Form for fund/org security access. The form is available in the Forms page on the Financial Services website.
<input type="checkbox"/>	FFO/FST Supervisor must complete and submit the FST Manager Membership Changes Form once <u>all</u> of the courses have been successfully completed. The form is available in the "For FFOs" page on the Financial Services website.
<input type="checkbox"/>	A specimen signature of the FST Manager must be submitted to the Central Travel Desk in Financial Services. Specimen signature template is available in the "For FFOs" page on the Financial Services website.