

## Banner Finance Organization Code Request Form

**Purpose:** Please complete this form to request the creation or modification of an organization in Banner.

**Instructions:**

1. Complete this form electronically and in **FULL**.
2. Once the form is completed, please forward to the appropriate budget holder for signature.
3. Upon approval, please forward to [coafinance@ontariotechu.ca](mailto:coafinance@ontariotechu.ca) for final approval and processing.
4. Email notification will be sent to the requestor upon completion.

**REQUESTOR:**

Name: \_\_\_\_\_ / \_\_\_\_\_  
(First) (Last)

Dept/Faculty: \_\_\_\_\_ Job Title: \_\_\_\_\_ Request Date: \_\_\_\_\_

**REQUEST TYPE:** Create New ORG: \_\_\_\_\_ Modify Existing ORG: \_\_\_\_\_

**ORG INFORMATION:**

ORG Title  
(35 characters max): \_\_\_\_\_

Purpose (Describe): \_\_\_\_\_

Effective Date: \_\_\_\_\_ Termination Date: \_\_\_\_\_

Additional Information: \_\_\_\_\_

**FINANCIAL MANAGER INFORMATION (eg. VP Level):**

Fin. Manager Name: \_\_\_\_\_ / \_\_\_\_\_  
(First) (Last)

Fin. Manager Title: \_\_\_\_\_ Employee ID: \_\_\_\_\_

**BANNER ACCESS:**

Banner Username (eg. OTMGRXX)	Name (First, Last)	Query	Posting	Both

**Budget Holder**

**Approval:** \_\_\_\_\_  
Name (please print) Signature Date (mm/dd/yyyy)

**Finance Department ONLY: :**

Assigned ORG: \_\_\_\_\_ Predecessor ORG: \_\_\_\_\_

Default Fund: \_\_\_\_\_ Default Program: \_\_\_\_\_

**Approval:** \_\_\_\_\_  
Name (please print) Signature Date (mm/dd/yyyy)

**Entered By:** \_\_\_\_\_  
Name (please print) Signature Date (mm/dd/yyyy)