

## TIPS ON COMPLETING THE FORMS TO ESTABLISH AGENCY FUND:

**Questionnaire for Establishing Agency Funds (A&F Forms Page <https://af.nmsu.edu/forms/>):**

### Section 1:

- 1) Requestor information of the person filling out the form to assist with questions
- 2) The Requestor will need to sign in Section 1

### Section 2:

- 1) Purpose—many organizations put something like track revenue & expenses
- 2) Responsible person – usually Advisor
- 3) Source—might be dues, fundraising, donations, etc.
- 4) Index to be charged in event of a deficit balance— **the unrestricted index # should be provided by the Advisor**. If the Advisor is not sure, the department Business Manager can assist. This cannot be an I & G or Restricted index.
- 5) How long will fund be needed—many organizations put “indefinitely”
- 6) Authorized person must sign
- 7) Advisor(s) must sign
- 8) If you want something specific done with any remaining funds after you are finished with the account, specify here. Most organizations just use the funds
- 9) It is required that you submit a copy of your by-law with the Questionnaire.

### Section 3:

Advisor must sign for Official Approval.

**New Fund Number (A&F Forms Page <https://af.nmsu.edu/forms/>):**

The **New Fund Number** form is used for all types of NMSU accounts, so all information on the form may not need to be filled out. Below is some information that will assist with completing this form.

**Only complete the items listed below.**

- 1) It is an Unrestricted Fund

### Section 1:

- 2) Requestor information of the person filling out the form to assist with any questions once it is completed

### Section 2:

- 3) Check mark Agency and in the drop-down choose appropriate agency type (Student or Department)
- 4) #8 Purpose—many organizations put something like track revenue & expenses
- 5) #10 Funding Source—might be dues, fundraising, donations, etc.
- 6) #13 is your Advisor’s name and info
- 7) #14 & 15 Name of your organization. Acronyms or abbreviations are not recommended

- 8) #16 The date the index should be effective
- 9) #18 There are two options for agency organizations:
  - a. The Agency Org # is **000002**, Org Name is **Agency**, Program # is **5000-Other**
  - b. Or your Advisor may prefer to use their department organization number and name.  
Program # is **5000-Other**

**Section 3:**

The **Advisor** will sign & date for approval. You do not need to complete any portion of the next page (page 3.) If you have any questions, please call the Aggie Service Center at 646-2000 or email [asc@nmsu.edu](mailto:asc@nmsu.edu).