

Resource and Financial Management Training

Resource Planning & Budget



LEARNING OUTCOMES

- Understand the meaning of Delegation of Authority
- How CSUF tracks Delegation of Authority
- Forms used

Elements of Delegation

- **Authority:** The ability to approve a transaction or perform a task
 - Top to Bottom
- **Responsibility:** To complete an action
 - Bottom to Top
- **Accountability:** To be responsible for the result of an action

Results of Delegation

- **Authority:** This can be delegated down the chain of command allowing others to perform tasks.
- **Accountability:** This ultimately remains at the top of the organization. The delegator is always accountable for the actions of the organization they oversee.

Budget Oversight Policy

(Policy ID: 8559139)

Status **Active** PolicyStat ID **8559139** Print Share

	Origination 10/12/2017 Effective 9/8/2020 Last Revised 9/8/2020 Next Review 9/8/2021	Owner Kitchell, Jeni: Executive Budget Director Area Business and Finance Code ICSUAM 02002.00
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Budget Oversight

Policy

It is the policy of the CSU that the campus chief financial officer ensure budget reviews occur during the fiscal year that compare budgeted and actual revenues and expenditures and take action to resolve any discrepancies.

Each campus and the chancellor's office must establish written policies and procedures that specify the minimum level and frequency of reviews to monitor budget performance.

Reviews to compare budgeted and actual revenues and expenditures must be documented, occur at least twice per year, and include any actions taken to resolve discrepancies. The documentation should be retained in accordance with campus written retention policies. Documentation should include details on the research to be conducted, a resolution plan, expected and final completion dates.

References

- [California State Auditor Report 2016-122, April 2017](#)
- [Parts d. and h. of Section VI of the Standing Orders of the Board of Trustees of the California State University](#)
- [Education Code, Division 8, Part 55, Chapter 6, and Article 2 §89720 et seq. and Article 4 §89756](#)
- Executive Order 1000 Delegation of Fiscal Authority and Responsibility

Authority

This policy is issued pursuant to [Section II of the Standing Orders of the Board of Trustees of the California State University](#), and as further delegated by the [Standing Delegations of Administrative Authority](#).

CSUF DOA Reporting

CALIFORNIA STATE UNIVERSITY FULLERTON Business Intelligence

Delegation of Authority Home | Favorites ▾ | Dashboards ▾ | Open ▾

Delegation Of Authority Procurement Card Travel Request FS Travel Request Directive 11

DOA Type: Requisition/Exp ▾
 Division: --Select Value-- ▾
 Sub-Division/College: --Select Value-- ▾
 Dept ID: 10338 ▾
 Dept Name: --Select Value-- ▾
 Employee Name: --Select Value-- ▾
 Effective Date As of: <= 04/25/2022 12:00:00 AM
 Status: A ▾ Apply Reset ▾

Delegation of Authority Status Report

Short Description ▾
 Division ▾
 Sub-Division/College ▾
 Department ID ▾
 Operator ID ▾

Short Description	Division	Sub-Division/College	Department ID	Operator ID	Operator Type	Effective Date	Status
Budget	Information Technology Div	Information Technology	10338	899899314	Approver	01/03/2013	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	07/01/2012	Active
Budget	Information Technology Div	Information Technology	10338	899845564	Approver	04/01/2019	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	04/08/2019	Active
Budget	Information Technology Div	Information Technology	10338	899604334	Approver	05/01/2016	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	05/01/2016	Active
Budget	Information Technology Div	Information Technology	10338	894866813	Approver	01/03/2013	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	07/01/2012	Active
Budget	Information Technology Div	Information Technology	10338	893739375	Approver	06/10/2013	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	06/10/2013	Active

Export

Date Range of Authority

CALIFORNIA STATE UNIVERSITY FULLERTON Business Intelligence

Delegation of Authority Home | Favorites | Dashboards | Open

Delegation Of Authority Procurement Card | Travel Request | FS Travel Request | Directive 11

DOA Type: Requisition/Exp
 Division: --Select Value--
 Sub-Division/College: --Select Value--
 Dept ID: 10338
 Dept Name: --Select Value--
 Employee Name: Adamson, Alyssa
 Effective Date As of: <= 04/25/2017 12
 Status: (All Column Val) Apply | Reset

Delegation of Authority Status Report

Short Description: Division: Sub-Division/College: Department ID: Operator Name:

Short Description	Division	Sub-Division/College	Department ID	Operator Name	Operator Type	Effective Date	Status
Budget	Information Technology Div	Information Technology	10338	Adamson, Alyssa A.	Approver	01/13/2016	Active
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	12/18/2015	Active

Export

Delegation of Authority Status Report

Short Description: Division: Sub-Division/College: Department ID: Operator Name:

Short Description	Division	Sub-Division/College	Department ID	Operator Name	Operator Type	Effective Date	Status
Budget	Information Technology Div	Information Technology	10338	Adamson, Alyssa A.	Approver	07/01/2017	Inactive
Requisition/Expense Transfer	Information Technology Div	Information Technology	10338		Approver	07/01/2017	Inactive

Export

Forms: Finance DOA

The screenshot shows a web browser window with the following elements:

- Browser Tab:** CSUF Portal | Forms Catalog
- Address Bar:** <https://myforms.fullerton.edu/content/csu/us/en/forms-catalog0.html>
- Page Header:** CSUF Forms (with university logos and a menu icon)
- Navigation Menu:** HOME | MY FORMS | MY DRAFTS | MY TASKS | HELP | WHERE IS MY FORM | REPORTS
- Search Bar:** Contains the text "DOA".
- Table:** A table with two columns: "Form Name" and "Actions".

Form Name	Actions
Finance DOA Access Request Form	
- Footer:** "Show 10 entries" and "Showing 1 to 1 of 1 entries (filtered from 53 total entries)".

Finance DOA



California State University, Fullerton Delegation of Authority Form

[Access and Compliance Form](#)

Use this form to delegate administrative responsibilities in connection with departmental financial transactions

Form ID	Approval Status
<input type="text"/>	<input type="text" value="In Progress"/>

Employee Information	Employee Information	
Delegation Roles/Approvers	* Employee ID: (CWID) <input type="text"/>	* Campus E-mail <input type="text"/>
Signatures	* First Name <input type="text"/>	* Last Name <input type="text"/>
	* Department Name <input type="text"/>	* Department ID <input type="text"/>
	* Title <input type="text"/>	* Campus Extension <input type="text"/>
	* Division <input type="text"/>	* Appropriate Administrator <input type="text"/>

Forms: Payroll Services

The screenshot shows a web browser window with the following elements:

- Browser tabs: CSUF Portal, Forms Catalog
- Address bar: <https://myforms.fullerton.edu/content/csu/us/en/forms-catalog0.html>
- Page Header: CSUF Forms
- Navigation Menu: HOME, MY FORMS (active), MY DRAFTS, MY TASKS, HELP, WHERE IS MY FORM, REPORTS
- Search Bar: Del
- Table:

Form Name	Actions
Delegation of Authority Change (Payroll Services)	

Showing 1 to 1 of 1 entries (filtered from 53 total entries)

Show 10 entries

DOA Form: Payroll Services



Delegation of Authority Change Request

To know more about the University Policy Statement: [Click Here](#)

Payroll Services	Payroll Services - Delegation of Authority Form				
Faculty/Staff Attendance	Complete form to add and/or delete a Timekeeper, Warrant Coordinator or Approving Official. Obtain the appropriate Divisional Approval(s).				
Student Attendance	Effective Date Division College				
Warrant Coordinator	05 / 03 / 2022 <input type="text" value="Select Division"/> <input type="text" value="Select College"/>				
CMS Student Confirmation Tickets					
Approvals	<table border="1"><thead><tr><th>Department/Dept ID:</th><th>Agency/Unit:</th></tr></thead><tbody><tr><td><input type="text" value="Select Department ID"/></td><td><input type="text" value="Select Agency/Unit"/></td></tr></tbody></table> <p><input type="button" value="Add"/> <input type="button" value="Remove"/></p>	Department/Dept ID:	Agency/Unit:	<input type="text" value="Select Department ID"/>	<input type="text" value="Select Agency/Unit"/>
Department/Dept ID:	Agency/Unit:				
<input type="text" value="Select Department ID"/>	<input type="text" value="Select Agency/Unit"/>				

Questions?

contact: budget@fullerton.edu