Account Authorization
Return completed form to Tower Foundation A/P, ext. zip 0183

☐ Create a New Account  ☐ Update Account No: ________________________________

Type of Account:  ☐ General Donation  ☐ Pre-Endowment  ☐ Scholarship
☐ Planned Gifts  ☐ Endowment  ☐ Endowment Distribution

Title of Account:_________________________________________________________
Purpose of Account:_____________________________________________________

College:____________________________________ Department:___________ Ext. Zip: _________
Recipient of monthly report (If different from first signer):________________________

Account Disclosures:
Is it anticipated that account activity will involve the following? NO YES

Volunteers ☐ ☐
Tower employees or volunteers driving as part of their job duties ☐ ☐
High risk or special events that may require a certificate of insurance ☐ ☐
Use of hazardous materials or hazardous activities ☐ ☐
Use of human or animal subjects ☐ ☐

Please see back of form for further instructions on any activities where “Yes” was checked.
Please sign the certification on page two.

Authorized Signatures for Expenditure:
By signing the account form and future expenditure requests, you are certifying that all expenses are for the purpose described above and that all SJSU and Tower policies have been complied with. Account signers acknowledge that an administrative charge will be assessed on expenses as they occur, excluding scholarships.

First Authorized Signer – Signature ____________________________
Second Authorized Signer – Signature ____________________________
First Authorized Signer – Typed or Printed ____________________________
Second Authorized Signer – Typed or Printed ____________________________

Campus Authorization:
Department Chair __________________________________________ Date __________
College Dean/Vice President ________________________________ Date __________

For Tower Foundation Use
Account Number Assigned: __________________________
Purpose Code: UN SF RE OR CP AT FA RP
Completed by: __________________________
Completed Date: __________________________
Account Guidelines

Additional instructions on any activity where “Yes” was checked:

- **Involving volunteers:** Contact Tower HR (4-1127) if your account activity will involve volunteers. Volunteers might require to complete the Volunteer Form and/or live scan.

- **High risk or special events that may require a certificate of insurance:** Contact Tower HR (4-1127) if you require a certificate of insurance for your events.

- **Tower Foundation employees or volunteers driving as part of their job duties may require a certificate of insurance:** When the Tower account will be used to pay Tower employees driving more than occasionally, the Tower Foundation COO should be provided with information about how often Tower employees/volunteers will be driving to ensure that appropriate insurance is in place.

- **Use of hazardous materials or hazardous activities:** If the project or program will use hazardous materials or engage in hazardous activities, the account administrator should contact the University’s Risk & Compliance Manager with the Human Resources Group to complete a “Hazard Assessment Survey & Analysis” form for the project/program. Copies of approved documents must be submitted to the Tower Foundation.

- **Use of human or animal subjects:** The Tower Foundation is required to comply with regulations pertaining to the protection of human subjects and the care and use of animals in research. The Graduate Studies and Research department is assigned to review and approve research that uses human subjects and animals. The Institutional Review Board (IRB) reviews all research conducted by SJSU students, faculty and staff involving the use of human subjects. The Institutional Animal Care & Use Committee (IACUC) is responsible for oversight and review of all issues related to animal care, facilities and procedures.

Copies of documents showing approvals of the project must be submitted to the Tower Foundation. No activities or transactions may be performed before copies of review or exemption are received by the Tower Foundation.

"One-up" signature approval is required for all reimbursements or payments made to the account signers.

All approvals/sign-offs must be obtained before commencing work. An independent contractor or new employee may not perform work until we alert you that all sign offs are complete.

Travel authorization approval (SJSU’s format is fine) is required for all overnight trips. Travel reimbursement requests must be submitted to Tower within 60 days of the travel and it must be completed on a Travel Expense Claim Form.

**CERTIFICATION**

I have read and understand the above requirements and will comply with them.

____________________________________  ______________________  
Authorized Signature                              Date

QUESTIONS SHOULD BE DIRECTED TO
TOWER FOUNDATION OF SJSU
ONE WASHINGTON SQUARE
SAN JOSE CA 95192-0183
408-924-1779