

**UNIVERSITY OF SOUTH CAROLINA  
REQUEST TO ESTABLISH 'E' FUND ACCOUNTS (OTHER EDUCATION AND GENERAL PROGRAM ACCOUNTS)**

Units wishing to establish an 'E' fund account need to provide the information requested in the table below to the budget office. Units are encouraged to read University Policy BUSF 3.30 (Other Education and General Program Accounts – 'E' funds) for additional guidance.

Users of this form will need to download it and save the completed form onto their computer using a unique name. A separate form should be completed for each new 'E' fund account request.

<b>Requesting Unit's Name and Contact Person's Name and Phone Number:</b>	
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**Provide a Concise Description of the Activity to be Tracked Using the Requested 'E' fund Account to Include the Source of Funding, Types of Services or Goods to be Provided, and the type of Customers to be Served:**

<b>Recommended Account Name</b>			
<b>Recommended Account No.</b>			
<b>Chairman's Name:</b>		<b>Principle Investigator's Name:</b>	
<b>Begin Date:</b>		<b>End Date:</b>	

**Specific Information Needed to Establish an 'E' fund Account:**

Information Needed	Examples of Positive Responses	Unit's Response
Do the funds identified to support this activity belong to USC?	Yes - the funds have no external restrictions and are controlled by the requesting unit.	
Is the source of funding provided for this activity an outside organization that has placed limitations on how the funds can be spent?	No – the funds have no external restrictions placed on them by an outside organization.	

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Information Needed	Examples of Positive Responses	Unit's Response
Will this activity be primarily funded by donations?	No – the account will be supported by revenues generated from (1) user fees for products or services, (2) student fees for continuing education, studies abroad, renovation fees, or technology fees, or (3) research-related indirect cost revenues.	
Will the proposed revenues generated to support this activity exceed \$5,000 annually?	Yes – but this may not occur in the first year of operation.	
Will the proposed revenues cover at a minimum all the direct costs of operations and if applicable the general administrative fee charged by the University to offset institutional support and physical plant services?	Yes	
What educational and general program does this activity support?	Instruction, research, public service, academic support, student services, institutional support, or physical plant	
Would you classify this activity as continuing education?	Yes	
Would you classify this activity as a departmental recharge center because you are providing a common service to other units of the University on a cost-reimbursement basis?	Yes – I have attached a completed 'Other Education and General Programs Budget Worksheet' for your review.	
Will your revenues exceed \$10,000 annually?	Yes – the revenues will exceed \$10,000 but not in the first year of operation.	
Would you classify this activity as research-related because the revenues generated are based on applying the University's approved indirect cost rates to the parameters established for individual research grants?	Yes – The source of revenue for this activity is the IDC revenues generated on this unit's grant accounts	