

Submitting Disbursement or Transfer Forms for UWOF Funds

Without a DocuSign Account (or if you don't want to login):

**Please note when using this method, you will not receive a notification that the disbursement form has been completed unless you also are the signatory for that fund.*

1. Navigate to the Foundation's Form Page: <https://uwosh.edu/foundation/forms-policies/>.
2. Select the form you need to submit.
3. Enter your name and email address under "prepared by" and the person's name and email address who has signature authority for the Foundation fund under "signatory."

PowerForm Signer Information

UWOF Disbursement Authorization Form (Under \$5K)
Fill in the name and email for each signing role listed below. Once you click "begin signing," you will be able to fill out the form and sign as the "prepared by" signatory. Then, the "signatory" will receive an email to review and sign the form.

Please enter your name and email to begin the signing process.

Prepared By (can be same as signatory)

Your Name: *

Your Email: *

Please provide information for any other signers needed for this document.

Signatory (Must have signature authority for the UWOF fund)

Name: *

Email: *

BEGIN SIGNING

4. Click "begin signing."

- You'll need to check the box to consent to use electronic records and signatures and click the "continue" button.

Please Review & Act on These Documents



Rebecca Smith
UW Oshkosh

Enclosed is a scholarship disbursement form for your signature.

Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures CONTINUE

- Complete the form as thoroughly as possible. If you do not include enough information or necessary attachments, your request will be rejected, and you will need to start over.

University of Wisconsin Oshkosh Foundation, Inc.
DISBURSEMENT AUTHORIZATION FORM

Date:	10/1/2021
Amount:	\$500.00
Fund Name:	Administrative Fund
Fund Number:	5050

Make check payable to: UW Oshkosh 233-321956-9

Reason for Expenditure: *Provide explanation and attach corresponding receipts or other appropriate documents. (The 2021 mileage reimbursement rate is \$0.56 per mile). To request a scholarship/award payment to a student, please use the Scholarship Disbursement Form.*

To reimburse our state account for...

Fields outlined in red are required.

Click the file attachment icon to add your supporting documentation.



- Upload each file you need to add as supporting documentation. If you are requesting a reimbursement to a state account, make sure to include a screenshot of that expense charged to your state account.

Learn more

Upload Attachment

✓ Invoice.pdf
2 pages - Upload Complete

UPLOAD A FILE

Done

You can add multiple attachments. Click "upload a file" to select each document.

8. Once you've completed the form, click on the "sign" box to add your signature. If you haven't signed documents in DocuSign before, a box may pop up to select your signature style and then you'll click "adopt and sign."

Prepared by:  Required - Sign Here _____

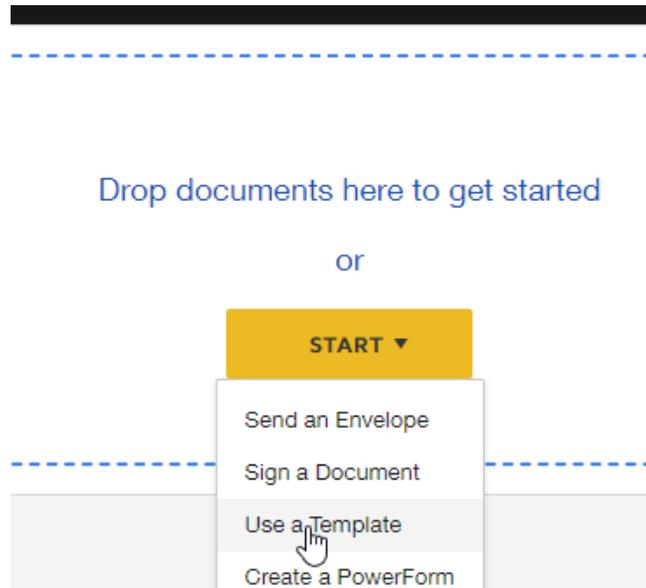
Authorized by:  _____

*Must be signed by individual with signature authority for this fu

9. Then, click "finish." The signatory will then be sent an email to review and sign the document.
10. Once the signatory signs the form, it will automatically be routed to Advancement and Foundation Staff for approval. Once everyone has signed, the signatory will receive a notification that the form has been completed and can download a copy. The "prepared by" individual will not receive a notification unless they are also the signatory for the fund. (This is a DocuSign setting that can only be updated by system administrators.)
11. Once completed, the disbursement form will be queued for processing and the check will be cut and sent based on the directions noted on the disbursement form. Per Foundation policy, checks are cut twice a month.

Using a Template in DocuSign:

1. Log into DocuSign: <https://app.docusign.com/>.
2. On the homepage, click on “start” and then “use a template.”



3. Click on “shared with me.” Then, select the form you need to use and click “add selected.”

Select Template ×

My Templates

Shared with Me

All Templates

Favorites

Folders

Shared Folders

	Name	Owner	Last Change
<input type="radio"/>	UWOF Disbursement Authorization Form (\$5K+)	Rebecca Smith	9/30/2021 10:11:26 am
<input type="radio"/>	UWOF Disbursement Authorization Form (Under \$5K)	Rebecca Smith	9/30/2021 10:11:02 am
<input type="radio"/>	UWOF Fund Transfer Authorization Form	Rebecca Smith	9/29/2021 03:40:03 pm
<input type="radio"/>	Scholarship Disbursement Form	Rebecca Smith	9/29/2021 03:36:31 pm

ADD SELECTEDCANCEL

4. Enter your name and email address under “prepared by” and the person’s name and email address who has signature authority for the Foundation fund under “signatory.”

UWOF Disbursement Authorization Form (Under \$5K)

Recipients

Prepared By (can be same as signatory) NEEDS TO SIGN CUSTOMIZE

Name *
Rebecca Smith

Email *
smithre@uwosh.edu

Signatory (Must have signature authority for the UWOF fund) NEEDS TO SIGN CUSTOMIZE

Name *
Lori Kroening

Email *
kroening@uwosh.edu

5. A standard message is included in the template, but you can update the email message or subject line.

Message to All Recipients

Email Subject *
Please DocuSign: Foundation Disbursement Request [[Si...
Characters remaining: 29

Email Message
Enclosed is a disbursement request.
Characters remaining: 9965

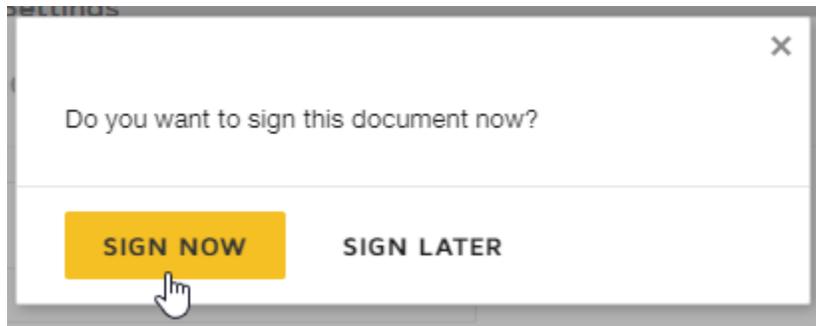
Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 45 days after send date
- Recipients are warned 30 day(s) before request expires
- Senders must use quick send

SEND **DISCARD**

6. When you’ve finished making changes, click “send.” This will “send” the form to you to fill out.

7. Click "sign now" to fill out the form and sign as the preparer.



8. Complete the form as thoroughly as possible. If you do not include enough information or necessary attachments, your request will be rejected, and you will need to start over.

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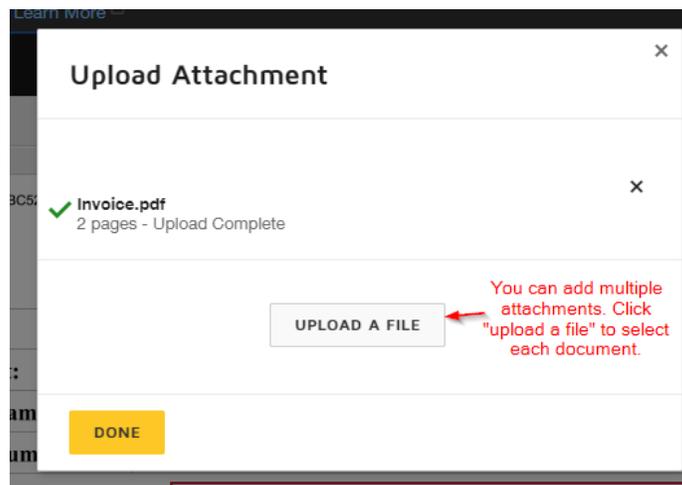
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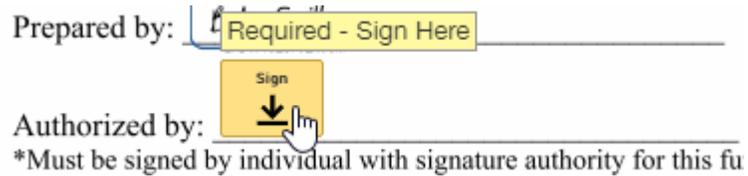
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