OSU Foundation Signature Authority Procedures

New project/account:

Appropriate department will be contacted by OSUF to complete the appropriate signature authorization form for the new account. Appropriate OSU personnel will need to update the online signature system for the new project/account.

Single project/account(s) signature authority changes:

Update the online signature system for the project/account, secure all required signatures (can be done using Docusign), and then send the completed form to OSUF Accounts Payable alec.williamson@osufoundation.org for processing.

Multiple project/account(s) signature authority changes:

PLEASE NOTE THAT THE, OSUF SIGNATURE AUTHORITY FORM – MULTIPLE ACCOUNTS, DOES NOT REPLACE THE NEED FOR EACH AFFECTED PROJECT/ACCOUNT TO BE UPDATED IN THE ONLINE SIGNATURE SHEET SYSTEM.

Complete an OSUF Signature Authority Form – Multiple Accounts for **each** signer being added, or deleted, and update online system for all affected project/accounts. This can be accomplished using Docusign.

Attach the "unsigned" online system signature form for each project being updated or an "Authorized Signer Change Request Report" from the online system.

ONLINE SIGNATURE SYSTEM FORMS
The form must be printed, or electronically produced, from the online signature sheet system so that the four digit document request ID number, assigned by the system, is in the lower left corner of the document or is included in the information on an Authorized Signer Change Request Report. The document request ID is used by OSUF to review and accept, or reject, the changes being requested. Send the completed form(s), via email or campus mail, to OSUF Accounts Payable alec.williamson@osufoundation.org for processing.

The new authorized signers, or other changes, will not be active for use in processing Scholarship, FS, or DPR system transactions until OSUF reviews and approves the document request ID.

No access to online system - Please refer to separate instructions below.

Online Signer System Instructions

This system is housed within GRRS and falls under the OSU Budget Office

Specific instructions for using the system – please contact the OSU Budget Office

Quick instructions:
1. Log into the Banner System or access from within the Online Reimbursement system
2. To create a new signer request – click on left side
3. Input the Account/Project ID and click Query
   a. The account/project name should appear in the query results section
4. Check the box to the left of the Account/Project ID that you need to update
5. Choose a name under Signer 1 and it will populate info in the New Signer Lookup section
6. Click add – it will populate the new signer info under the New Authorized Signers Section
7. To add others put their OSU ID number in the OSU ID field under New Signer Lookup and click Lookup, then Add
8. We require two signers for each project, it is recommended that you set up at least 3
9. Once you have all signers added, click Submit and it will convert to a PDF form
10. Signer(s) being removed should autofill. Signers being removed do not need to sign; however the reason they are being removed from the account can be indicated; i.e. left OSU, retired, deceased, left department, position changed, etc.
11. Submitting the form will cause it to print out the online system version of the signature authority page for that specific account/project
12. Make a copy for your files
13. If you are using the MULTIPLE SIGNATURE AUTHORITY FORM no signature(s) is/are required on this online system form
14. Attach to OSUF MULTIPLE Signature Authority Form – this form does require original signature by the new signer and approver. Can be accomplished using Docusign.
15. Send OSUF MULTIPLE Signature Authority Form with original or docusign signatures ==with online system forms attached== to OSUF Accounts Payable
16. The new authorized signers, or other changes, will not be active for use in processing Scholarship, FS, or DPR system transactions until OSUF reviews and approves the document request ID.

If you have problems, or questions with the online signer sheet system please contact the OSU Budget Office at 7-4121.

NOTE: If the person being added as a signer is not an OSU Employee they, generally, cannot be a signer on a Foundation Account.

QUESTIONS regarding forms, procedures, and who can be an authorized signer can be directed to the OSUF Assistant Controller at 7-4922.

<u>THE FOLLOWING PROCESS SHOULD ONLY BE USED IF THE ON LINE SYSTEM CANNOT BE USED</u>

No access to online system – How to Update Signature Forms

Log on to OSU Foundation Website: http://osufoundation.org/ Go to bottom of page and click on Staff Resources, then Online Forms. Under the Accounting section, choose Organization Signature and proceed to complete the form. The form can be completed using Docusign.

All the lines on the form are required to be completed. We require at least 2 signers, but prefer 3. The signers that are being added or are continuing as signers should have their name and title typed on the form and then the authorized signer must sign, providing a signature sample. If this can be accomplished utilizing Docusign, that is acceptable. Please use ink **other** than Black for signatures, if not using Docusign. When signers are being replaced we do need their name listed in the "has been replaced" area. Please provide a reason why they are no longer signers: ex: left OSU, retired, deceased, left department, position changed, etc.

1. Make a copy for your files
2. Send OSUF Organization Signature Form, for processing, with all required signatures to OSUF Accounts Payable alec.williamson@osufoundation.org or via mail to:
   OSU Foundation
   Attn: Accounts Payable
   4238 SW Research Way
   Corvallis, OR 97333-1068
3. Changes to signatories can only be accepted and approved by OSUF when the proper forms are received