

## New Foundation Account Request for Disbursement

### Submitters Only

1. Log into UConncontact.
2. Open the Foundation Account Request for Disbursement form using the following link:  
<https://uconncontact.uconn.edu/submitter/form/start/457987>.
3. Click on **NEW SUBMISSION** (if this is not your first time opening the form).
4. Enter your organization's name and your contact information.
5. Click **NEXT**.
6. Fill out the required fields:
  - a. Purchase Order (PO) or Electronic Funds Transfer (EFT)
  - b. Amount
  - c. Payee
  - d. Describe items/services for this disbursement
7. Combine all necessary documentation into one document and attach via the "Upload File" button in the last field. Accepted documentation includes the original invoice, receipt or similar supporting documentation demonstrating proof of payment. See below for the expected backup documentation for each payment type:

**Reimbursements** – Original itemized receipt/invoice showing proof of payment for items purchased or services rendered, roster, flyer/program/brochure, and agenda as needed.

**Purchase Orders** – An itemized quote/invoice for products ordered or services rendered; payment will not be made in advance of receipt of goods or services.

8. If your file size is too large. Send additional documentation to [lillian.palacios@uconn.edu](mailto:lillian.palacios@uconn.edu).
9. Click **NEXT**
10. Add Reviewer(s):
  - a. A Reviewer is an Executive Officer on the Signature Sheet.
  - b. The Treasurer and President are expected to serve as the two required Reviewers, provided they are not the payee.
  - c. If the Treasurer or President is the payee, the 3<sup>rd</sup> Officer must be added as the second Reviewer
  - d. Enter the UConn email(s) for necessary Reviewer(s).
11. Once all Reviewer's emails have been added ... Click **NEXT**.
12. Click **SUBMIT** to finalize the form.
13. **Copy Page 3 of these instructions into an email.**
14. **Send the email to the selected authorized Reviewer(s).**
15. Reviewers on the form will receive an email to examine the information. They must open the form, review the data, and approve or deny the information.

16. SABS will approve the form when the information provided is accurate and complete and all Reviewers have given the form a **thumbs up**. You will be notified of this approval.
17. Email [lillian.palacios@uconn.edu](mailto:lillian.palacios@uconn.edu) if you have **not** received an approval notification and would like a status update.

**Reviewers (Authorized Signors on Signature Sheet):**

Reviewers will receive an email from UConntact to review the form.

1. Open the email from UConntact with the subject line “**Review Form Submission: Foundation Account Request for Disbursement**”
2. Click the blue **REVIEW SUBMISSION** box in the email to open the form.
3. Click **Expand All** and review the Request.
4. If you accept the form as submitted:
  - a. Click the **thumbs up** symbol next to your name in the **Your Review** section.
  - b. Scroll to bottom of the screen.
  - c. Type “**Approved**” in the **Discussion** section.
  - d. Click **POST**.
  - e. Exit the form.
5. If you do not agree with the information on the form:
  - a. Click the **thumbs down** symbol next to your name in the **Your Review** section
  - b. Scroll to bottom of the screen.
  - c. Type your **reason for not agreeing** in the **Discussion** section.
  - d. Click **POST**.
  - e. Exit the form.