



The University of Oklahoma Foundation

New Fund Request Form

Electronic Submission Instructions

October 20, 2020

Foundation Contact: Deborah Marsh
dmarsh@ou.edu, Ph. 310-4839



To begin the process of requesting a new fund number (account) access the Foundation website URL:
<http://www.oufoundation.org/Fund>

Choose the correct Domain name from the dropdown menu (Norman Campus domain is SOONER).



New Fund Request Login

Login Options

- Foundation Sponsor Users: Foundation assigned username and password
- Norman Campus University (Sooner): OU Net ID (4+4) and password
- OU HSC University Campus: HSC username and password
- University of Oklahoma Foundation (Foundation): University of Oklahoma Foundation username and password

Select your login

University Login Sponsor Login

Domain

Select your Domain...

Please select your Network Domain.

Username

mars4889

Password

.....



Remember Me



Login

Login using your credentials.



New Fund Request Login

Login Options

- Foundation Sponsor Users: Foundation assigned username and password
- **Norman Campus University (Sooner):** OU Net ID (4+4) and password
- OU HSC University Campus: HSC username and password
- University of Oklahoma Foundation (Foundation): University of Oklahoma Foundation username and password

Select your login

University Login

Sponsor Login

Domain

SOONER

Username

mars4889

Password

.....

Remember Me



Login

Select +Create New Fund Request



[Request List](#) [Log Out](#)

New Fund Request Manager

Welcome Mr. Lawrence Mantin

[+ Create New Request](#)

[Pending](#) [Pending College Approval](#) [Pending Approval](#) [College Approved](#) [Work in Progress](#) [Approved](#) [Declined](#) [Canceled](#)
[Info Needed](#) [Completed](#) [Open Discussions](#)

No requests for this criteria.

Enter in the required information utilizing drop down menus as needed.

[Save](#) [Cancel](#) [Discussions](#) [Timeline](#) [List](#) [Help](#)

Date Requested

10/16/2020 4:55 PM

Pending Fund Number

Requester Name

Mr. Lawrence Mantin (lmantin@ou.edu)

Requester Phone Number *

(405) 887-1869

Requested Fund Title *

Location *

Select a Location...

Tulsa Campus Fund?

Fund Type *

Select a Fund Type...



Amount of Initial Deposit *

Endowed fund requires \$25,000 minimum. Expendable fund requires \$1,250 minimum with intent to continue support for at least 5 years. If the initial deposit does not meet the minimum, please explain below.

Initial Deposit Explanation

1000 characters remaining

Source of Funds

Delivery Method *

How will the funds be delivered to the Foundation?

Purpose *

If "Other", please add description in the "Other Information" section below

Intent of Funds

500 characters remaining

College *

Department/School *

Select the Primary and Counter Sponsors

Begin typing a sponsor's name, the menu will auto-populate the full name. You must click with your mouse on the name to select the correct sponsor. Typing in the name and tabbing to the next field will not select the correct person.

Sponsors

Account activity such as payment requests/transfers, sponsor changes, narrative/purpose changes, etc., require two authorize/sponsor approvals, one Primary and one Counter, for processing.

It is recommended that two of each type of authorize/sponsor be assigned to each fund to ensure an alternate approver in the event of authorize/sponsor absence.

In the event the department/college requires multiple primary and counter signatures, an alternate option is available. Please contact **Deborah Marsh**, phone: (405) 310-4839 to discuss this option.

When choosing fund sponsors, if an individual does not appear below, the individual will need to be added through the **Fund Sponsor Request** website. This will redirect you to the Fund Sponsor Request website. Once the fund sponsor request is completed and approved, you'll be notified by email. At this point, you can return to your saved Fund Request and complete the process by adding the newly added sponsor.

[Manage Fund Sponsors](#)

Primary 1 *

- Leah Moser
- Enter a sponsor's name...

Primary 2

Required Signatures

Counter 2

Required Signatures

Status of Agreement

A governing fund agreement is required for all Foundation accounts. Draft agreements must be pre-approved by **Kathy Harlin** who will submit all final agreements for signatures via © DocuSign.

Indicate status of agreement below.

- Draft agreement submitted to the Foundation for review

Select Draft Agreement file...

Valid file types (.doc.docx)

- Approved agreement in process via © DocuSign

- Completed agreement on file at the Foundation

Select Completed Agreement file...

Valid file type (.pdf)

- Request Agreement Template
View Available Agreement Templates

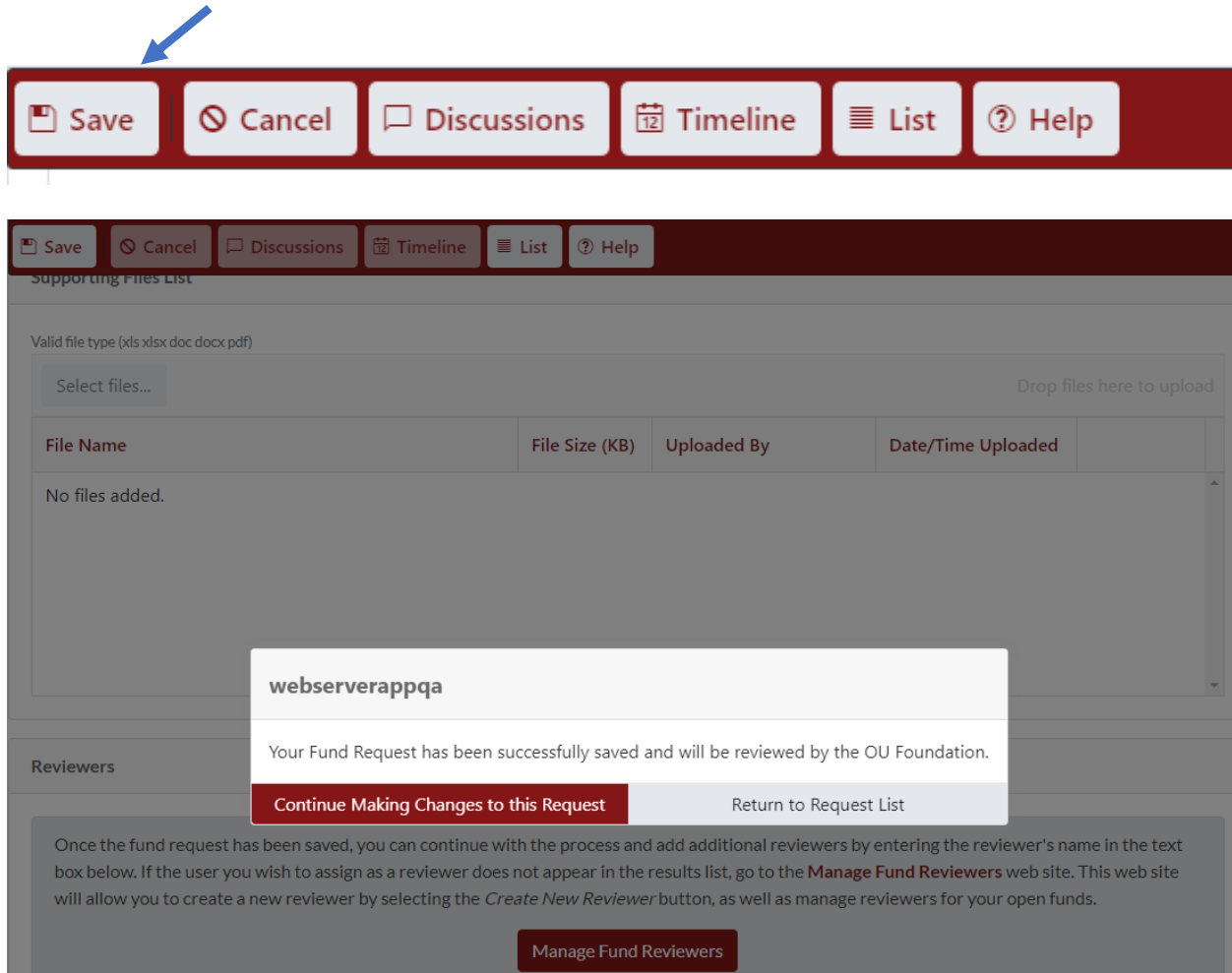
Agreement Comments

If none of the agreement options apply, please explain below.

500 characters remaining

Please explain why no agreements options have been selected.

Save the form by selecting the Save icon at the top of the menu. Select Continue Making Changes to the Fund Request to complete the entire process.



The screenshot shows a web application interface with a dark red header bar containing several buttons: Save, Cancel, Discussions, Timeline, List, and Help. A blue arrow points to the 'Save' button. Below the header is a 'Supporting Files List' section with a file upload area and a table with columns: File Name, File Size (KB), Uploaded By, and Date/Time Uploaded. The table is currently empty, showing 'No files added.' A modal dialog box is open in the center, displaying the username 'websverappqa' and the message: 'Your Fund Request has been successfully saved and will be reviewed by the OU Foundation.' The dialog has two buttons: 'Continue Making Changes to this Request' (highlighted in red) and 'Return to Request List'. Below the dialog is a 'Reviewers' section with a text input field and a 'Manage Fund Reviewers' button.

Once the form has been saved, you can continue with the process and add any supporting files. If you have any additional documents that may be helpful in the review of the request attach to the form by using the Select files button and uploading the documents.

Supporting Files List

Valid file type (xls xlsx doc docx pdf)

Select files...
Drop files here to upload

File Name	File Size (KB)	Uploaded By	Date/Time Uploaded
No files added.			

Add any additional Reviewers you wish. Follow the same process selecting the names from the drop-down menu.

Save
Cancel
Discussions
Timeline
List
Help

Reviewers

Once the fund request has been saved, you can continue with the process and add additional reviewers by entering the reviewer's name in the text box below. If the user you wish to assign as a reviewer does not appear in the results list, go to the **Manage Fund Reviewers** web site. This web site will allow you to create a new reviewer by selecting the *Create New Reviewer* button, as well as manage reviewers for your open funds.

Manage Fund Reviewers

Allison G. Richardson

Robert E. L. Richardson

No reviewers added.

The Other Information or Remarks field can be used to include any additional information.

Other Information or Remarks

1000 characters remaining

Save the Form and choose Return Home.

Home Save + New Cancel

www.oufoundation.org

Your Fund Request has been successfully saved and will be reviewed by the OU Foundation soon.

Continue Making Changes to this Fund RequestReturn Home

Once you select Save and Return Home, the form will automatically be submitted into the Foundation system and a notification will be sent to the appropriate Foundation staff.

You'll be able to see your requested fund as a row in the New Fund Request Manager dashboard. From here you'll be able to see the status of each request.

New Fund Request Manager

Welcome Mr. Lawrence Mantin

[+ Create New Request](#)

Pending
⌚ Pending College Approval
⌚ Pending Approval
✔ College Approved
✍ Work in Progress
✔ Approved
✘ Declined
⌛ Canceled

? Info Needed
📄 Completed
🗉 Open Discussions

	Requested
<div style="background-color: #800000; color: white; padding: 5px; text-align: center; margin-bottom: 10px;">+ Create New Request</div> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <div style="display: flex; justify-content: space-between;"> Example Requested </div> <div style="display: flex; justify-content: space-between;"> Mr. Lawrence Mantin Today 2:15 PM </div> <div style="margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; display: flex; justify-content: space-between;"> View/Edit > </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; display: flex; justify-content: space-between;"> Discussions > </div> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;"> Timeline > </div> </div> </div>	

If additional information is needed by the Foundation to complete the process, you will see a notification flag on the Info Needed tab. The preparer will also receive an email to this effect.

New Fund Request Manager

Welcome Mr. Lawrence Mantin

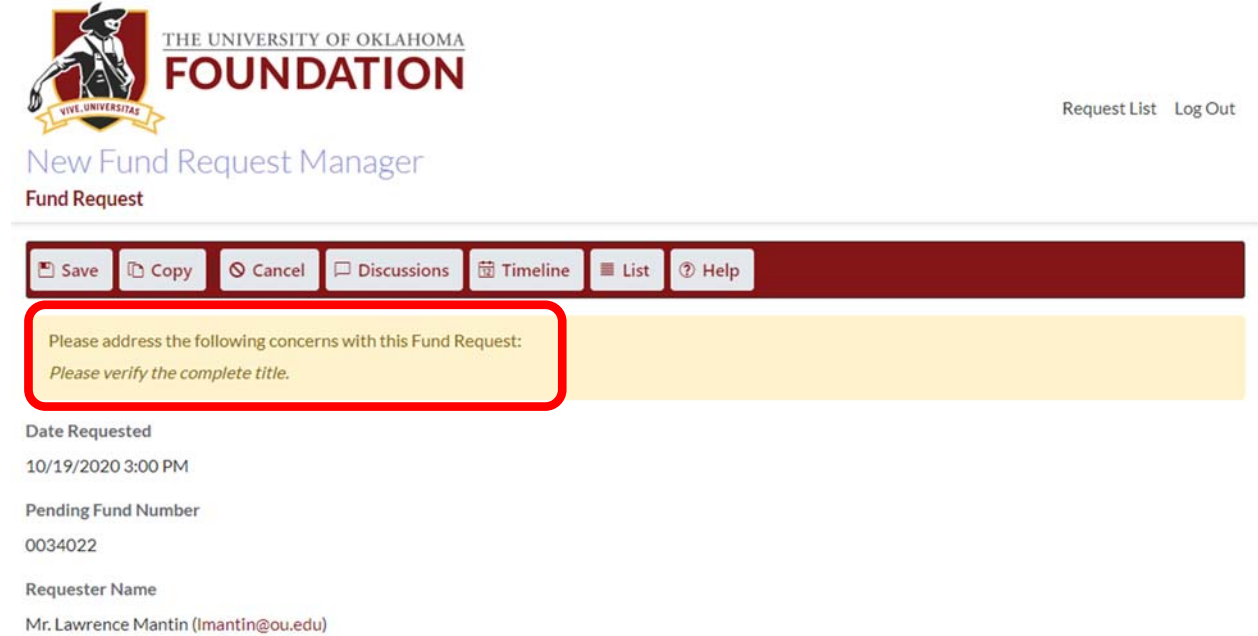
[+ Create New Request](#)

Pending
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Open the form by clicking the View button and review what is needed.



The screenshot shows the 'New Fund Request Manager' interface. At the top left is the University of Oklahoma Foundation logo. To the right are links for 'Request List' and 'Log Out'. The main heading is 'New Fund Request Manager' with a sub-heading 'Fund Request'. Below this is a dark red toolbar with buttons for 'Save', 'Copy', 'Cancel', 'Discussions', 'Timeline', 'List', and 'Help'. A yellow warning box with a red border contains the text: 'Please address the following concerns with this Fund Request: Please verify the complete title.' Below the warning box, the following information is displayed: 'Date Requested: 10/19/2020 3:00 PM', 'Pending Fund Number: 0034022', and 'Requester Name: Mr. Lawrence Martin (lmartin@ou.edu)'.

Update information and Save the form and select Return Home.

Once a request completes the review process within the Foundation and is approved, the preparer, and all the listed sponsors will receive a notification email containing the fund number information.