The University of Oklahoma Foundation

New Fund Request Form

Electronic Submission Instructions
January 23, 2018

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).
Login using your credentials.

Enter your login credentials.

- **Foundation Users**: Foundation assigned username and password
- **Norman Campus University (Sooner)**: OU Net ID and password
- **OU HSC University Campus**: HSC username and password
- **OU Foundation (Foundation)**: OU Foundation username and password

**Domain**

**SOONER**

**Username**

`mars4889`

**Password**

`********`

Log in

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Select +Create New Fund Request

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

Once the form has been saved, you can continue with the process and add any additional Reviewers you wish. Follow the same process selecting the names from the drop-down menu.
The Other Information or Remarks field can be used to include any additional information.

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.

Save the Form and choose Return 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 dashboard. From here you’ll be able to see the status of each request.

You can view the status of an existing fund request or click **Create New Fund Request** to initiate the new fund request process. Click on the ▶ in the grid below to view the Requests’ history.

<table>
<thead>
<tr>
<th>Requested Fund</th>
<th>Current Status</th>
<th>Requester</th>
<th>Date Requested</th>
<th>Request Type</th>
<th>Amount of Initiation</th>
<th>Agreement S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Fund</td>
<td>Pending</td>
<td>Deborah Marsh</td>
<td>1/11/2018 1:12 PM</td>
<td>Annual/Special (Expendable)</td>
<td>$1,250.00</td>
<td>No</td>
</tr>
</tbody>
</table>

If additional information is needed by the Foundation to complete the process, you will see a Current Status of “Additional Information Needed”. The preparer will also receive an email to this effect.
Open the form by clicking the View button and review what is needed.

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.