Instructions for filling in the Delegation of Signing Authority Form

GENERAL FORM INFORMATION

This form can be used for updating or deleting information for existing accounts. You can use this form to add a delegate to an existing account by checking the Update box on the form.

If you are creating new accounts you must first use the Request to Establish a New FAST Account form located on the Accounting Services website located at https://web.finance.uvic.ca and select the Forms tab on the yellow bar and then select the link to this form in the General Accounting (FAST) section of the Accounting Forms webpage. You can then use the Delegation of Signing Authority Form to create a Delegation for Signing Authority.

The Delegation of Signing Authority form can be found on the Purchasing website located at https://web.uvic.ca/PURC/ and select the e-forms sidebar menu item and then select the Paper forms link on this page.

OR
From the Accounting website located at https://web.finance.uvic.ca and select the Forms tab on the yellow bar and then select the link to this form in the General Accounting (FAST) section of the forms webpage.

The Delegation of Signing Authority form is a fillable PDF form. This means you can enter information directly in the form fields using your Internet Explorer or Netscape browser for PC users. Once you have entered the required information you can print the form and have both the account holder and delegate sign it in the signature box.

Macintosh users may need to download the form to complete it as you may not have an Adobe Reader Plug-in for your browser. You will need to download the free Adobe Reader.

If you need help with accessing these forms contact the UVIC Computer Help Desk at local 7687 or your departments technical support person.

If you have a problem using the form contact the UVIC Computer Help Desk at local 7687.

If you have a problem with the information the form is to contain contact the UVIC Purchasing department at Local 8326.

All fields on the form must be completed except for Delegated Maximum Dollar Limit per Transaction and Delegation Valid Until.

If any fields other than the noted exceptions are not completed the form will be returned to you for completion.
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FORM NAVIGATION

To navigate through the form use the TAB key on your keyboard to move from one form field to the next form field.

You can directly use your mouse to click into any field but the Tab sequence will then follow from the field you last clicked in.

If you need to start a form over press the Reset Form button at the top of the form.

Note: Clicking on the Reset Form button deletes ALL fields you have entered. Only use this button if you want to remove all field information. If you need to create more than one Delegate then manually change each field as necessary but be sure that you have the correct information in all fields for that additional delegate.

The tab order through the form is to fill in the Account holder fields first then the delegate information and finally the account information.

FORM FIELDS

Create, Update and Delete

The Create, Update and Delete fields are check boxes you can only select one. Create to create an Account Holder or Delegate. Update to change information on an Account Holder or Delegate and Delete to remove a Delegate.

Account Holder

The Date field is a drop down list where you can select the date as month, day and year.

The Name field can only accommodate an entry of 40 characters 2 Capitals and 38 lowercase. If you type in your name all in caps it will only allow 30 characters. If your name is longer than 40 characters then Print it in after you print the form instead of typing it into the form.

The Phone No field can only accommodate 10 numbers and two –’s. The format for a full phone number is ###-###-####.

The Position Title field can only accommodate an entry of 40 characters. If you type in your position title all in caps it will only allow 30 characters. If your position title is longer than 40 characters then Print it on the form after you print the form instead of typing it into the form.

The UVic ID field can only accommodate 9 numbers as this is the length of Uvic employee number. V00 #######.

The Signature field is not fillable as you will sign your name in this field after completing the form and then printing the form.
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More FORM FIELDS

Delegate

The **Department** field can only accommodate **30 characters**. You can use the 4 character short form name for your department. E.g. (ACCT for accounting).

The remaining fields for a Delegate are the same as for the Account Holder.

Purchase Requisitions

The **Account Name** field can only accommodate **37 characters**. You can use short forms for words in the account name. If account name is longer than 37 characters then Print it in after you print the form instead of typing it into the form.

The **Fund/Org** field can only accommodate **5 numbers** each as all FAST Fund and Organization codes are 5 numbers long.

The **Delegated Maximum Dollar Limit per Transaction** fields is a drop down list you can select one of the 7 drop down menu choices.

The **Delegation Valid Until** field is a drop down list where you can select the date as month, day and year.
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**Date:**
Enter Date as Month/Day/Year.

**Name and Phone No.:** Self explanatory.

**UVIC ID:** You can find your employee number on your pay stub or on your benefits healthy/dental card. V00####

**Position Title:** Contact Human Resources if you do not know your position title. **Local 8085**

**Signature:** After filling out the form print it. Sign in this box so that the signature lies entirely within the borders of the box.

**Account Name, Fund/Orgn and Maximum Dollar limit:** Enter the Maximum dollar limit; it is what ever the Account Holder limit is as outlined in the Signing Authority policy.

**Delegation Valid Until:** Date is optional. Enter date as Month/Day/Year.