# 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.**

# Instructions for filling in the Delegation of Signing Authority Form

## 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.

# Instructions for filling in the Delegation of Signing Authority Form

**Reset Form** Button is used if you need to clear all the fields you have entered or you want to start a new form for another delegate.
Be careful you do not tab through the form fast hit the reset form as it will clear all fields you have entered.

**Create** Select if you are creating a delegate or account holder.
**Update** Select if you are updating information for a delegate or account holder.
**Delete** Select if you are deleting a delegate.

**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 health/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.

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University of Victoria | Purchasing Services

**DELEGATION OF SIGNING AUTHORITY**
FOR PURCHASE REQUISITIONS

LOCAL: 8326    FAX: 8327    RESET Form    Check one:    Create ☐    Update ☐    Delete ☐

**\*\*\*\*\*\*\*\*\*\*REQUIRED FOR AUDIT PURPOSES\*\*\*\*\*\*\*\*\*\***

| ACCOUNT HOLDER | DELEGATE |
|---|---|
| **DATE** (mmm/dd/yy): Month    Day    Year | **DEPARTMENT:** |
| **NAME:** (Print or Type below) | **NAME:** (Print or Type below) |
| **Phone No:** | **Phone No:** |
| **UVIC ID: (V00######)** (Print or Type below) | **UVIC ID: (V00######)** (Print or Type below) |
| **Position Title:** (Print or Type below) | **Position Title:** (Print or Type below) |
| **SIGNATURE:** (FULL REGULAR SIGNATURE) * | **SIGNATURE:** (FULL REGULAR SIGNATURE) * |

**\*Signature must be contained within the borders of the boxes.**

**PURCHASE REQUISITIONS** – Refer to BOG Policy 1002, Section 2, and Procedure No 1 Contracts and Agreements – APPENDIX "A"

| ACCOUNT NAME (Optional) | FUND (5 Numbers) | ORGN (5 Numbers) | DELEGATED MAXIMUM DOLLAR LIMIT PER TRANSACTION |
|---|---|---|---|
| | | | Select Dollar Limit |
| | | | Select Dollar Limit |
| | | | Select Dollar Limit |

**MUST BE CONSISTENT WITH BOG SIGNING AUTHORITY POLICY 1002**

I HEREBY AUTHORIZE MY DELEGATE NAMED ABOVE: TO SIGN PURCHASE REQUISITIONS ON MY BEHALF. I UNDERSTAND THAT PURCHASING SERVICES MAY, AT THEIR DISCRETION, RETURN REQUISITIONS FOR MY CONFIRMATION

THIS DELEGATION IS VALID UNTIL    Month    Day    Year    OR RESCINDED.

The University of Victoria is designated as a local public body under the Freedom of Information and Protection of Privacy Act (FOIPPA). This act applies to all records in the custody, or under the control of the University. The Act provides access to the records of the University and prohibits unauthorized collection, use or disclosure of personal information by the University.

There are a few exceptions to the right of access. Section 21 on disclosure harmful to the business interests of a third party requires the University to refuse to disclose information only when the information meets the three part test outlined in the section.

Personal information is collected on in accordance with Section 26 (c) which states: "No personal information may be collected by or for a public body unless that information relates directly to and is necessary for an operating program or activity of the public body".

**PLEASE RETURN TO PURCHASING SERVICES FOR PROCESSING**

Delegation of Signing Authority                                           Feb/07