University of Hawai‘i Foundation

User Guide to Submit Online Requests for ORS Agreements

FOR UH EMPLOYEES

LAST MODIFIED ON 1/5/2023

Introduction to Creating an Online Request for ORS Agreement

Starting January 2023, UHF is implementing DocuSign CLM (Contract Lifecycle Management) to streamline the request for ORS agreement process and automate the eSignature route. The online form is very similar to the fillable pdf form, where the same information is requested.

To access the online form, visit the UH Foundation website at https://www.uhfoundation.org/. From there, go to **Resources / Forms**. In the Finance Forms section, scroll down to Expenditure and select **Request for ORS Agreement**. Selecting this option will direct you to the online request form.

FINANCE FORMS

Account Setup

Request for Establishment of Account - Orange Form

Account Changes

Change in Account Administrator

Change in Support Staff Viewing Access

Online Fund Update Request

Codes for Finance

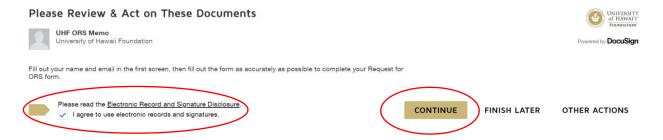Chart of Accounts

Expenditure

Check Request

Purchase Order Requisition

Request for ORS Agreement

Payment Requests Form for Student Aid Recipients - Concur
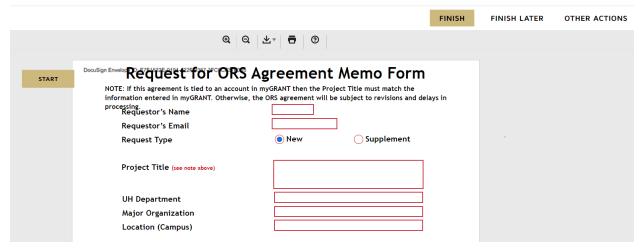• To process payments outside of Concur, please contact **studentaid@uhfoundation.org** for more information.

Read the Electronic Record and Signature Disclosure, then check the box to agree to use electronic records and signatures. Select **Continue** to access the Request for ORS Agreement Memo Form.

Please Review & Act on These Documents

UHF ORS Memo
University of Hawaii Foundation

UNIVERSITY of HAWAI'I FOUNDATION

Powered by **DocuSign**

Fill out your name and email in the first screen, then fill out the form as accurately as possible to complete your Request for ORS form.

Please read the Electronic Record and Signature Disclosure.
☑ I agree to use electronic records and signatures.

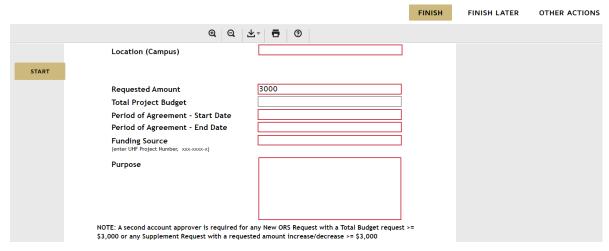CONTINUE   FINISH LATER   OTHER ACTIONS

New Agreements

Request a NEW agreement by completing the required fields outlined in red. To create a SUPPLEMENTAL agreement, refer to the instructions in the next section.

1. **Requestor's Name and Email**: Insert first and last name of person making the request and an email address. Communication and updates on the ORS request will be sent to this email address.

2. **Request Type**: Select "New" (or "Supplement") as appropriate

3. **Project Title**: The title listed here on new agreements must also be used on future supplemental agreements attached to this request.

4. **UH Department**: Insert the department associated with this agreement (i.e., History).

5. **Major Organization**: This is the college under which the department falls under (i.e., College of Arts, Languages and Letters)

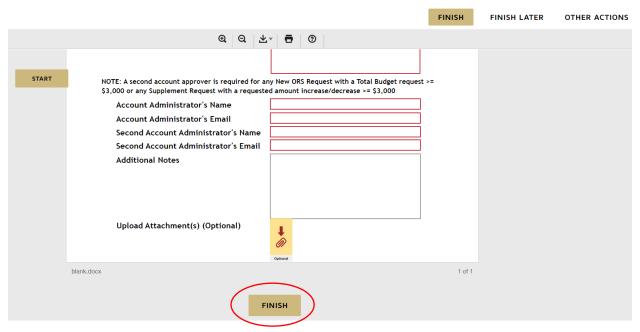6. **Location**: Insert the campus at which the department is located (i.e., Manoa).

7. **Requested Amount**: Enter the total budget for this project. Two Account Administrator approvals are required if the amount is $3,000 or more.

8. **Period of Agreement**: Enter the start and end date for this project.

9. **Funding Source**: Enter the 8-digit UHF account number that will be used to fund this project.

10. **Purpose**: Type the main purpose for which the funds will be used. For example, "to support salaries and wages for researchers."

11. **Account Administrator's Name and Email**: Enter the name and email address of the Account Administrator who will electronically approve this request. The request with a link to the form will be emailed to this individual.

12. **Second Account Administrator's Name and Email**: If the Requested Amount is $3,000 or more, these fields will be revealed for entry. Enter the name and email address of the second Account Administrator who will electronically approve this request. After the first Account Administrator approves, the request will be routed to the second Account Administrator.

13. **Upload Attachment(s)**: Select the icon to provide supporting documents such as approved budgets or other schedules to support this request. These documents will follow the request through the electronic approval process.

Once all required fields have been completed correctly, select the **FINISH** button. The form and supporting documents (if uploaded) will be emailed to the first Account Administrator (AA) listed, then automatically routed to the second AA (if applicable) for electronic signature approval. A UHF reviewer will then process the request and contact the person listed in the **Requestor's Name and Email** fields if more information is required.

Supplemental Agreements

Request to update an existing agreement by selecting **Supplement** and complete the required fields outlined in red. Additional fields will be revealed based on responses selected within the form.

HINT: Keep a copy of previous forms submitted. The same information might be used in subsequent requests.

1. **Requestor's Name and Email**: Insert first and last name of person making the request and an email address. Communication and updates on the ORS request will be sent to this email address.

2. **Request Type**: Select "Supplement"

3. **Supplement Number (if known)**: Enter the next number of the supplemental agreement requested. The Supplement Number is "1" if it is the first update requested for an existing agreement.

4. **Project Title**: Use the same title that was established on the NEW agreement.

5. **UH Department**: Insert the department associated with this agreement (i.e., History).

6. **Major Organization**: This is the college under which the department falls under (i.e., College of Arts, Languages and Letters)

7. **Location**: Insert the campus at which the department is located (i.e., Manoa).

Request for ORS Agreement Memo Form

NOTE: If this agreement is tied to an account in myGRANT then the Project Title must match the information entered in myGRANT. Otherwise, the ORS agreement will be subject to revisions and delays in processing.

Requestor's Name

Requestor's Email

Request Type   ◯ New   ◉ Supplement

Supplement Number (if known)

Project Title (see note above)

UH Department

Major Organization

Location (Campus)

8. **Requesting Agreement Modifications**: Select to modify the "Budget Amount" and/or "Period of Agreement"

9. **Budget Amount**: Select to increase or decrease the budget amount.

10. **Requested Amount**: Enter the amount you want to increase or decrease the total budget for this project. Two AA approvals are required if the amount is $3,000 or more.

11. **Total Project Budget**: Enter the total project budget (after increase/decrease)

12. **Period of Agreement**: Enter the new end date for the agreement.

13. **Funding Source**: Enter the 8-digit UHF account number that will be used to fund this project (i.e., XXX-XXXX-X).

14. **Purpose**: Type the main purpose for which the funds will be used. For example, "to support salaries and wages for researchers."

Location (Campus)

Requesting Agreement Modifications   ☑ Budget Amount   ☑ Period of Agreement

Requesting a Budget   ◉ Increase by   ◯ Decrease by

Requested Amount

Total Project Budget

Period of Agreement - End Date

Funding Source
(enter UHF Project Number, xxx-xxxx-x)

15. **Account Administrator's Name and Email**: Enter the name and email address of the Account Administrator who should electronically approve this request. The request with a link to the form will be routed sent to this person through email.

16. **Second Account Administrator's Name and Email**: If the amount entered in the Requested Amount is $3,000 or more, these fields will be revealed for entry.

17. **Additional Notes (Optional)**: Provide additional notes, such as other changes that need to be made to an agreement.

18. **Upload Attachment(s)**: Select the icon to provide supporting documents such as approved budgets or other schedules to support this request. These documents will follow the request through the electronic approval process.

Once all required fields have been completed correctly, select the **FINISH** button. The form and supporting documents (if uploaded) will be routed to the first AA email listed, then automatically routed to the second AA (if applicable) for electronic signature approval. A UHF reviewer will then process the request and contact the person listed in the **Requestor's Name and Email** fields if more information is required.

NOTE: A second account approver is required for any New ORS Request with a Total Budget request >= $3,000 or any Supplement Request with a requested amount increase/decrease >= $3,000

Account Administrator's Name

Account Administrator's Email

Additional Notes

Upload Attachment(s) (Optional)

Optional

ank.docx   1 of 1

FINISH

Email Notifications

The online ORS agreement process, powered by DocuSign CLM (Contract Lifecycle Management), sends out several system-generated email notifications. These email notifications will come from the email address "UHF ORS Memo via DocuSign CLM <**mailman@springcm.docusign.net**>"

Email Description	Email Recipient
Confirmation email when a request is submitted	Request Submitter
Notification to an approver that a request has been sent to them for approval. Reminders sent every 2 days	Account Approver(s)
(For requests of $3000 or more which require two approvers) Notification that the first approver has signed, and the request is being routed to the second approver for signing	Request Submitter
Notification that all approvers have signed and the request is being routed to the UHF Fiscal Department for processing	Request Submitter
Notification that the request has been canceled or rejected	Request Submitter
Notification that the ORS agreement has been signed by the UHF Controller and is partially executed	Request Submitter and Account Approver(s)

| Notification that the ORS agreement has been signed by the ORS Director and is fully executed | Request Submitter and Account Approver(s) |

Questions
If you have any questions, please send an email to **UHFORSMemo@uhfoundation.org**.