



Last Updated: December 2006

I.15 Changing Existing Gift Agreements or Administrative Agreements

1. Changes of *Purpose, Signature Authority, Fund Description (Name) or Attributes (page 2 of NPSUF)* to existing Gift Agreements or Administrative Agreements can be made by following the procedure set forth below:
2. An **Agreement Revision Form** should be completed by the requesting campus.
3. The Agreement Revision Form should be emailed, along with proper backup, to the Account and Award Manager at the Foundation. (*Examples of proper backup: written letter or email from the donor or signature authority requesting and authorizing the change will be accepted.*)
4. The Account and Award Manager will verify that the changes are accurate, acceptable and in the case of purpose, donor initiated; and that the proper backup has been submitted to authorize the change. He/she will print the Agreement Revision Form on **GREEN** paper and forward to the Database Administrator, who then forwards it to Accounting, for processing in RE/FE.
5. Once the change is made in RE/FE and all parties have signed off on the form, Accounting will forward the form to the Foundation Administrative Assistant who will then scan the form (in black and white) and **email a fully executed copy (excluding backup)** to the requesting campus and **file the original change request along with backup** in the appropriate Fund File on top of the original Gift Agreement or Administrative Agreement. An electronic copy of the fully executed form should also be saved on the server in *Foundation\Policies, Procedures & Agreements & placed in the appropriate campus folder.*
6. Once all changes are made in RE/FE, the requesting campus can print and forward the **UA Foundation Agreement Report*** indicating the changes made to the Fund to each department benefiting from the fund.

** This is a Crystal Report ran out of .NET Infoview on the Citrix Server under Public Folders\Fund Reports\Foundation Agreement Report. See "**XX.X** Running a Crystal Report (from Infoview)" for information on how to locate and run this report.*