

NUFFO Fund Authority Form Instructions

The Fund Authority Form is used to add, change or remove spending and viewing authorities of foundation funds. If you have questions, please contact Tina Barnes at the foundation at by email at tina.barnes@nufoundation.org or 402-458-1123.

1. The form is a fillable PDF that can be completed electronically with a handwritten signature, scanned and returned by email to biographicalrecords@nufoundation.org.
2. The **applicant** is the person for whom fund access is being requested.
3. The **NU ID** or **Employee ID** is required to identify the applicant. The NU ID is an eight-digit number and the Employee ID is a five-digit number. Either one is sufficient.
4. Every fund has a person or position established as the **primary spending authority** and is listed in the Fund Summary Memorandum on each fund detail record in NUFFO. In some cases, there are two separate primary spending authorities required. Please review the Fund Summary Memorandum to verify the person or position established as primary spending authority.
5. **Approver's Information:** the person holding primary spending authority may designate others with duplicate spending or viewing authority. Primary spending authorities may also designate spending or viewing authority for specific individual funds under their authority.
 - a. The primary spending authority's approval is required for any duplicated spending or viewing authority.
 - b. When the primary spending authority is being replaced, the new primary spending authority's supervisor is the approver.
6. If a primary spending authority departs, anyone they had approved as duplicate spending and viewing authority will need to seek approval for access with the person replacing them as primary spending authority.
7. Please allow two weeks for processing.

This form is to add, change or remove spending and viewing authorities of foundation funds. You will receive an email once the authority updates are completed. Complete this form, obtain necessary signatures and email it to biographicalrecords@nufoundation.org. Please allow up to two weeks for processing. Direct questions to Tina Barnes at tina.barnes@nufoundation.org or 402-458-1123.

..... **Applicant's Information**

Applicant's Name (person requesting authority): _____

Title: _____ **NU/Employee ID:** _____

Campus/College/Dept.: _____

Campus Telephone: _____ **Campus Email:** _____

Applicant's Signature: _____

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The individual listed above will need (check all that apply):

- New access to the NU Foundation Funds Online (NUFFO) portal in Ali CRM.
- Remove access to the NU Foundation Funds Online (NUFFO) portal in Ali CRM.
- Primary Spending Authority – this replaces the previous primary signature authority held by previous primary spending authority's name and title: _____.
- Duplicated Spending Authority – this extends duplicated spending authority held by the primary authority. Primary spending authority's name and title: _____.
- Duplicated Viewing Authority – this extends viewing authority of funds held by the primary authority. Primary spending authority's name and title: _____.
- Specific Fund Authority – this provides spending or viewing authority on a specific fund(s). Check which type of authority is needed: spending viewing. List the fund numbers below or attach a list:
- Remove access to specific funds. List the fund numbers below or attach list:

..... **Approver's Information**

Authorized by (*primary spending authority's name): _____

*if this is a request to replace a primary spending authority, this would be authorized by the applicant's direct supervisor.

Signature: _____

Title: _____ **Date:** _____

Campus Email: _____