



USER GUIDE FOR DISBURSEMENT OF FOUNDATION FOR SCALIA LAW FUNDS

This guide sets forth what you need to know to pay bills, reimburse employees, and allocate credit card expenses from Foundation for Scalia Law (FSL) funds. This guide and related links are [housed on FSL's website](#).

You should also refer to the Foundation's various policies and procedures, which are located on the FSL website.

Accessing the funds

Introductory note

FSL uses automated webforms rather than fillable .pdfs to approve and disburse funds. This has several advantages:

1. The forms are easier to fill out, with drop-down menus for GL codes and department names
2. All of the forms look alike and are filled out in the same way
3. Invoices and other attachments can be dragged and dropped into the form as .pdfs.
4. Once you submit the form, it automatically goes to the next person who is required to approve it; there is no need to email .pdfs back and forth
5. You will automatically receive an email update as the form moves through each approval stage, including payment by FSL's accounting partner, SAGe Advisory Group

The forms

FSL uses these forms for accessing and disbursing funds:

Form name/link	GMUF form replaced/link	Purpose
Payment voucher	GMUF voucher (fillable)	Pay vendors and reimburse employees and students with FSL funds
Payment voucher: LEC only		Pay LEC vendors and reimburse LEC employees and students with FSL funds
Direct deposit authorization	New form	Encrypted form authorizing FSL to deposit employee reimbursement directly into bank account (sent directly to SAGe)
IRS Form W-9	IRS Form W-9 and W8-BEN	Required of all vendors; styled as webform that converts to completed form in IRS format (sent directly to SAGe)
IRS FW-8 BEN-E		
Credit card allocation	B of A works (GMUF cards)	Allocation of expenses charged to Foundation for Scalia Law Mastercard
Journal entry form	GMUF Journal Entry Form	Transfer of FSL account funds or expenses between FSL accounts

Please note

1. The Advancement Office maintains a list of delegates for purposes of completing credit card allocation and expense reimbursement reports. Please report that information, and let the Office know of any changes (info@foundationforscalia.org).
2. **Please do not complete any credit card allocations until you receive an excel sheet from SAGE Advisory Group** listing all charges for that month's statement period.
3. If your office needs a credit card, or if an employee leaves the school's employment, please notify the Advancement Office.
4. Before submitting payment vouchers, please make sure that there are adequate funds in the appropriate FSL account, especially during the transition period as GMUF balances are spent down and FSL balances are being built up.

Questions?

Contact the Advancement Office (info@foundationforscalia.org), 703 993 8093.

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