

Foundation Disbursement Process:

Effective **July 1, 2021** the disbursement process for payments from the foundation will be as follows;

Disbursements will be initiated with the use of Adobe Sign. Anyone initiating the disbursement should have an Adobe Sign account which can be requested with a work order to ITS.

You will need to add the Adobe Sign email address to the approved sender list. Below are the steps on how to do it:

- When in Outlook click the “Home” tab
 - Click “Junk” under the Delete category
 - From the drop-down list click “Junk E-mail Options”
 - Click the “Safe Senders” tab
 - Click “Add”
 - Enter the following email address: echosign@echosign.com
 - Click “OK” twice
1. https://www.cobleskill.edu/about/leadership/campus-policies/college_advancement_policies.aspx
 2. Click “Disbursement Form”
 3. Complete web form’s required fields and attach back up documentation.

The screenshot shows a web-based disbursement approval form. At the top left, the SUNY Cobleskill logo is displayed, along with the text 'POWERED BY Adobe Sign'. The main header reads 'Please approve: Department Disbursement Test'. The form title is 'SUNY Cobleskill Foundation/Alumni Disbursement Approval Form'. The form contains several input fields: 'Date' (pre-filled with 'Feb 1, 2021'), 'Amount: \$' (with a yellow input box), 'Disbursement to:' (with a yellow input box), 'Address:' (with a yellow input box), 'Purpose:' (with a yellow input box), and 'Account #' and 'Account Name:' (each with a yellow input box). A yellow arrow labeled 'Start' points to the left side of the form. At the bottom left, there is a language dropdown menu set to 'English: US'. At the bottom right, there is a footer with the text '© 2021 Adobe. All rights reserved. Terms Consumer Disclosure Trust Cookie preferences'.

UNIVERSITY **Cobleskill** | POWERED BY Adobe Sign ?

Options ▾ Please approve: Department Disbursement Test

Start

Account #: _____ Account Name: _____

Department Chair Approval: _____

Dean Approval: _____

VP Business and Finance Approval: _____

Over \$5,000 – Second VP Signature: _____

Click to Attach File Attachment 1	Click to Attach File Attachment 5
Click to Attach File Attachment 2	Click to Attach File Attachment 6
Click to Attach File Attachment 3	Click to Attach File Attachment 7
Click to Attach File Attachment 4	Click to Attach File Attachment 8

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- a. The form will send automatically to the Finance Associate in Advancement.
- b. Email updates on the progress will be sent as well as the final copy when complete.

Please direct questions to Shannon Manchester, Finance Associate for Advancement.

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- 518-255-5687