

Return to Accounting Services - Gifts
 For assistance with Gift Routing Forms, email giftmgt@bussvc.wisc.edu
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To complete a NEW Gift Routing Form:

A. Click on “Check Routing Form – Create New Entry”


B. Contact Information

- Select the **Add/Change Contact** button.
- Type last name and first name of the person who is completing the form. Select **Search**.
- Select the correct person. The program will fill in the appropriate data.

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C. Deposit Information

- Enter the information for each check you wish to deposit.
- You can add more checks by selecting the **Add New** button.
 A new set of blank boxes to enter additional checks will appear after selecting the **Add New** button.

 UNIVERSITY OF WISCONSIN-MADISON

Gift Check Routing Form

Print and send completed Gift Routing Form to your Dean's Office for approval.

CONTACT INFORMATION

Entry #	Name	Phone #	Email Address	Add/Change Contact
				<input type="button" value="Add/Change Contact"/>

ADD CHECKS

(When Check Donor is 'UWF' - Check Number and Check Date will default to 'TBD'.)

Check Seq#	Check Amount	Check Donor	Check Number	Check Date	Edit/Update	Delete
					<input type="button" value="Add New"/>	

Total Money From Checks: \$0.00
 Total Money Going to Projects: \$0.00
 These two values should be equal.
 There is \$0 not allocated to projects.

D. Add Projects

- Choose one of two options:
 - Option 1: Type Project ID and to search for an existing gift project.
 - Option 2: Type ALL fields with information for a new project and .

ADD PROJECTS

Option1: Search for an Existing Project:

Project ID:

Project Title:

PI Name:

Department ID:

Department Name:

Option2: Enter a New Project:

Project Title:

Donor Name:

Project Start Date (mm/dd/yyyy):

Project End Date(mm/dd/yyyy):

PI Name:

Department ID:

Department Name:

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- Complete all required information on View/Edit Project Information page and .

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View/Edit Project Information

Project ID:	233FS40				
Title:	OFFICE OF CORPORATE RELATIONS				
Donor Name:	UWF - UNIVERSITY OF WISCONSIN FOUNDATION				
Fund:	233				
Start Date:	6/20/2003				
End Date:	12/31/2099				
Department ID:	022430				
Department Name:	VC UNIV RELATNS™ OCR				
PI Name:	Sweeney Jr,Vincent J				
Amount:	<input type="text" value="400.00"/>				
Total Money From Checks: \$500.00					
Total Money Going to Projects: \$0.00					
PI Type:	<input checked="" type="radio"/> Faculty/Other	<input type="radio"/> Director	<input type="radio"/> Dean	<input type="radio"/> Chair	<input type="radio"/> Chancellor
PI Tenure Status:	<input checked="" type="radio"/> Permanent PI	<input type="radio"/> Limited PI	<input type="radio"/> Tenured PI		
Program Codes:	<input type="checkbox"/> All Activities	<input type="checkbox"/> 3 - Hospitals	<input type="checkbox"/> 7 - Physical Plant		
	<input type="checkbox"/> 0 - Student Services	<input checked="" type="checkbox"/> 4 - Research	<input type="checkbox"/> 8 - Auxiliary Enterprises		
	<input type="checkbox"/> 1 - Institutional Support	<input type="checkbox"/> 5 - Public Service	<input type="checkbox"/> 9 - Financial Aid		
	<input type="checkbox"/> 2 - Instruction	<input type="checkbox"/> 6 - Academic Support	<input type="checkbox"/> F - Farm Operations		
Human Subject Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Vertebrate Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Stem Cell Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Needs Space Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Environmental Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Toxic Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			
Building or Equipment Clearance:	<input type="radio"/> Yes	<input checked="" type="radio"/> No			

- You will return to the main entry screen.
- When all information is complete, select the button.
- A PDF version of the form information will be created. Print this form for routing with the check(s).

The signature line is created when you print the Gift Check Routing Form.

- Principal Investigator – For new projects only, as they as not yet created in the system. The PI is not required to sign additions to existing projects.
- Department Chair – Based on your division’s requirements. Please check with your school or college’s research division for requirements.
- Division – Required in all cases.