

Instructions for SABS Banking Contract (new platform in KualI Build):

- Pages 1 and 2 - for Treasurers Only
- Page 3 - for Executive Officers and Advisors (Authorized Signers on Banking Contract)

TREASURERS ONLY

1. Click on the link to the SABS Banking Contract on the [Virtual Front Desk](#).
2. Login with your NetID Single Sign-On
3. Choose the correct **Effective Dates** from the dropdown list
4. In the **Organization Name** section, search for your organization:
 - a. If a new organization, type "**NEW**" then select "**NEW - This organization does not have a bank account with SABS yet**" and enter the name of your organization below
 - b. Be sure to enter your organization name **exactly** as it appears on UContact
5. If your organization has a SABS bank account:
 - a. Your Organization Number will auto-populate
 - b. Your Beneficiary Information will auto-populate
6. In the **Beneficiary Information** section, select one of the options for Beneficiary Status:
 - a. If you select option 1 – move on to the next section
 - b. if you select options 2 or 3 you will need to fill in the **Updated Beneficiary Information** section. (This information will be confirmed by SABS.)
7. In the **Treasurer** section, enter the treasurer's name:
 - a. The NetID and Email will auto-populate
 - b. Enter the treasurer's phone number (format = xxx.xxx.xxxx)
 - c. Click on the **Sign this form** box under your name
 - d. Type your name in the box to E-sign the form
 - e. Click **Save**
8. Enter information about the members of your organization who are authorized to review disbursements:
 - a. Once the name is entered, the NetIDs and Emails will auto-populate
 - b. Do not sign for the President
 - c. Manually enter everyone's phone number (format = xxx.xxx.xxxx)
 - d. Manually enter the Executive Officers' titles
 - e. President, Advisor, and Executive Officer 1 are mandatory
 - f. Executive Officer 2 is optional, but highly recommended
9. Verify that all information has been entered correctly
10. Click the **Submit** box in the top right corner of the form (under Actions)

11. If you would like to send instructions to your Signers copy Page 3 of these instructions into an email
12. Send the email to the President, Advisor, and Executive Officers you listed on the form
13. In this online platform (Kuali Build), people on the banking contract are referred to as **Signers**
14. All signers on the form will receive an email from Kuali Notifications:
 - a. The subject line will say: **“Request for Approval: SABS Banking Contract**
 - b. Signers only receive their email once the previous signer has approved the form
15. Signers must open the form, review the data, sign, and approve or deny the form as submitted
16. SABS will approve the form when the information provided matches your organization’s UConn roster and all authorized Signers have given the form their Approval. You will be notified of this approval
17. Email SABS@uconn.edu if you have **not** received an approval notification and would like a status update

EXECUTIVE OFFICERS AND ADVISORS (AUTHORIZED SIGNERS ON SABS BANKING CONTRACT)

1. Open the email from Quali Notifications with the subject line “**Request for Approval: SABS Banking Contract**”
2. Click the **Begin Review** box in the email to open the form
3. Review the contract information
4. If you agree with the contract information:
 - a. Click on the **Sign this form** box under your name
 - b. Type your name in the box to E-sign the form
 - c. Click **Save**
 - d. Click the **Approve** box in the top right corner of the form (under Actions)
 - e. Comments are optional then click the **Approve** box
5. If you do not agree with the contract information:
 - a. Click the **Send Back** box in the top right corner of the form (under Actions)
 - b. Enter reason in the **Add Comments** box and click the **Send Back** box
6. If you do not want this contract to exist and do not want to be a part of this contract:
 - a. Click the **Deny** box in the top right corner of the form (under Actions)
 - b. Enter the reason in the **Add Comments** box and click the **Deny** box