**How to: Submit a HEETF Request**

1. Access the DocuSign form through this link:
   https://wmdocusign.wm.edu/url/go/equipmenttrustfund

2. Enter in your name and email as the requester.

   **PowerForm Signer Information**
   
   Fill in the name and email for each signing role listed below. 
   Signers will receive an email inviting them to sign this document.
   
   Please enter your name and email to begin the signing process.

   **Requester**

   **Your Name:** *
   
   Full Name

   **Your Email:** *
   
   Email Address

3. Enter the appropriate Department Chair/Director’s name and email address.

4. Enter the appropriate Dean/VP’s name and email address.
   a. For A&S Submissions:
      i. For A&S Dean, please enter Susan Mulholland (smulholland@wm.edu)
How to: Submit a HEETF Request

5. Click BEGIN SIGNING to initiate completing the form.

   Department Chair / Director

   Name:
   Full Name

   Email:
   Email Address

   Dean / VP

   Name:
   Full Name

   Email:
   Email Address

6. Complete the required fields in the red boxes.

   The requestor further confirms the department’s ability to cover expenses not allowable under HEETF (including, but not limited to software license fees and equipment warranties) from another funding source. All procurement and financial operations procedures will be followed.

   Department/Program: Budget Test
   User: Tina Tester
   Requester: Abby Houser
   Purchaser: Sally Tester
How to: Submit a HEETF Request

7. Choose the type of purchase. If “Other”, you will be prompted to provide a brief description of the type of equipment.

- Classroom A/V Equipment
- Server
- Computer
- Other Equipment, please specify:
- Lab Equipment
- Network Equipment

8. Complete Vendor Name, Estimated Cost and Index to be charged.
   a. NOTE: if multiple indexes are used, please include that information in the description of purchase section

   Vendor Name: _______________________

   Estimated Cost: $__________

   Index to be charged: ____________

   Requester: Please attach quote / documentation to support requested amount

9. Attach quote/documentation to support the request.
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11. Review the information and click FINISH to submit.

12. Request will then route to Department Chair/Director for signature. The Department Chair/Director will have the option to add additional documentation.

13. If approved, Department Chair/Director clicks FINISH to move the request to the Dean/VP for review and approval.

14. Request routes to Dean/VP for signature. The Dean/VP also has the option to add additional documentation.

15. If approved, the Equipment Trust Fund Committee receives submission, reviews, and takes action.

16. Department Requester receives final document with Committee’s determination – Approved, Defer, or Not Approved. If Approved, the Requester (or designee) will be able to submit an IT approval request (if required) or move directly to submitting an eVA order request (if IT approval is not needed).
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Frequently Asked Questions

What if an approver does not feel that the request meets HEETF requirements or an alternative may be able to resolve the need?

Because DocuSign does not allow for returning, only accept or reject, please contact the Requester outside of the DocuSign system and communicate the determination or request additional information.

If, after additional information is received and the final determination is to move forward, please sign the DocuSign form and attach the additional documentation to support the request.