

# Authorised Signatories Help Guide

---

The following guide explains the criteria required for submitting an Authorised Signatory form along with examples of what each form should look like once completed.

## *Introduction*

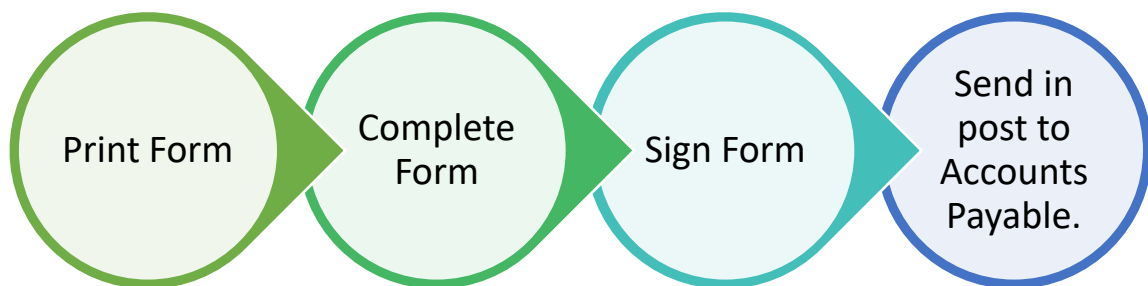
Before a member of staff can authorise any manual invoices or expense claim forms they must be set up as an authorised signatory. This will be approved by their line manager or Head of School/Unit. These signatories are held within a secure database which is maintained by Finance.

## *Accessibility*

Specimen signatures are held on the database and are used by Finance and Salaries to check and approve expense claims.

## *Adding or amending a signatory*

To be added as a signatory please use the “New Authorised Signatory Form” (see [part A](#) for more details on how to complete). To amend a signatory please access the “Authorised Signatory Amendment Form” (see [part B](#) for more details on how to complete). Please follow the process outlined below:



If you have any enquiries relating to Authorised Signatories, please contact Accounts Payable.

## Part A

### New Authorised Signatory Form

---

#### Section 1

To be completed by the signatory being added to Authorised Signatory database

#### Section 2

To be completed by Head of School/Unit.

Both sections must be completed in full to avoid a delay in payment of invoices and expense claims.

#### **Completing Section 1:**

User ID is your University username e.g. *JB716*. This is the same as the first part of your University email address i.e. [jb716@st-andrews.ac.uk](mailto:jb716@st-andrews.ac.uk).

<b>To be completed by new signatory:</b>	
User ID	<input type="text" value="JB716"/>
Name (Print)	<input type="text" value="JOE BLOGGS"/>
Signature*	<input type="text" value="JBloggs"/>
*Signature <b><u>MUST</u></b> be within the lines of the above box	

Please ensure **Section 1** is complete before moving on to **Section 2**.

## Completing Section 2:

- Each Cost Centre must be listed individually. If you require more space please continue listing each cost centre and restriction on the reverse of the form;
- Please avoid using wording such as “All History Cost Centres”.
- All restrictions should be noted (see example below).

### Restrictions:

Restrictions can apply to cost centres, but also to individual analysis codes. In this case analysis codes must be detailed in the ‘Restrictions’ box.

<b>Section 2:</b>	
<b>To be completed by Head of School / Unit:</b>	
<b>Cost Centre</b>	<b>Restrictions (Must be completed)</b>
	Up to £1,000 for analysis code S***** only
	Up to £..... S***** / C***** / N***** Only
	Up to £.....

Please **DO NOT** leave Restrictions blank or quote “None” as the form will be returned to sender and marked as incomplete. The maximum restriction that can be applied is ‘up to £20,000’.

Please ensure this section is signed by Head of School/Unit and the name is printed clearly.

Signed by Head of School / Unit: .....

Print Name: .....

Name of School / Unit: .....

Date: ...../...../.....




Once completed please send this form to: Accounts Payable, Finance, Walter Bower House, Gaurdbridge, St Andrews, KY16 0US

## Part B




### Authorised Signatory Amendment Form

---

Please put 'X' to mark the relevant amendment.

-  **Add** – adding existing signatory to an additional cost centre / adding an additional analysis code to an existing cost centre and signatory
-  **Edit** – edit restriction amounts (to edit signatory name use [New Authorised Signatory Form - Part A](#))
-  **Remove** – an analysis code from an existing signatory, remove a signatory from database, and remove a cost centre from a signatory

**To be completed by School / Unit:**

Cost Centre				Name of Signatory	Restrictions (Must be completed)
	X			<a href="#">Joe Bloggs</a>	Up to £1,000
			X	<a href="#">Joe Bloggs</a>	N/A
		X		<a href="#">Joe Bloggs</a>	Up to £2,000

- Each Cost Centre must be listed individually. If you require more space please continue listing each cost centre and restriction on the reverse of the form;
- Please avoid using wording such as “All History Cost Centres”.
- All restrictions should be noted (see example above).

**Please ensure this section is signed by Head of School/Unit and the name is printed clearly.**

Signed by Head of School / Unit: .....

Print Name: .....

Name of School / Unit: .....

Date: ...../...../.....

**Once completed please send this form to: Accounts Payable, Finance, Walter Bower House, Gaurdbridge, St Andrews, KY16 0US**