

**UC REGENTS
CAMPUS GIFT ACCEPTANCE REPORT
UDEV 100-3 INSTRUCTIONS
(R10/04) 71461-257**

DEPOSIT INSTRUCTIONS: Complete a Statement of Cash Collections (SCC) using DaFIS and submit checks and SCC to campus cashiers office.

1. DONOR NAME: Enter the name of the legal owner of the gift being transferred. If several donations (each under \$1,000) are being submitted to a single fund number, type "VARIOUS" in Item 1. **You do not need to prepare a separate UDEV for each gift.** Prepare and attach a Various Donors Information Sheet (VDIS) to Form UDEV 100-3. (See P&P 260-25; the VDIS exhibit may be copied from the manual for use by Departments.)

DaFIS DOCUMENT #: Enter the DaFIS Statement of Cash Collections (SCC) document number.

2. ADDRESS OF DONOR: Enter the address of the donor.

3. DEPOSIT PREPARED BY/PHONE NO: Enter the name and phone number of the person who was responsible for generating the deposit or statement of cash collections (SCC).

4. DEPOSIT AMOUNT: Enter the full amount of the deposit or SCC.

5. DONOR REQUESTS CONFIDENTIALITY: Requests for confidentiality must originate with the donor and must be in writing.

6. SCHOOL/COLLEGE/OTHER: Enter the name of the school, college or program, etc. that the benefiting department is in.

7. DEPARTMENT NAME: This is the name of the benefiting department, division or program of the donation.

8. FORM OF ACKNOWLEDGMENT: To be tax deductible to the donor, gifts of \$250.00 and above must be acknowledged by the benefiting department by letter, card, or receipt (per IRS regulations). The acknowledgment for cash gifts must state amount of gift, date received, and reiterate the donor's instructions/wishes, and state whether any goods or services were provided in exchange for the gift. The letter must also include the IRS and gift fee disclosures. Acknowledgment letters for gifts-in-kind, (non-cash gifts) and securities must describe the gift, but not state the value/amount of the gift. (See examples in P&P 260-25.)

9. DONOR INSTRUCTIONS/WISHES: The purpose/use of donation **as stated by the donor ONLY**. The University is legally bound to comply with the donor's wishes. Quote from written donor correspondence. If there is no original donor correspondence attached, please explain the circumstances. Notations on the check, check payee and emails (from the donor) are considered donor instructions. If donation is property (Gift-in-kind), describe in detail.

9a. Indicate if donation is intended for endowed or current use.

9b. Indicate the source of the gift fee (method of how fee is to be assessed).

10. DATE RECEIVED: The received date is the date the first University office or representative received the donation by mail or in person. Immediately date stamp all donor correspondence. If correspondence or copies of checks are delivered to the gift form processor without date stamps, the gift form processor should use a date of three days from the check date. If you are preparing a various donors information sheet, type month and year received.

11. GIFT PLEDGED: The amount the donor has pledged in writing to donate in the future and/or over a period of time. The terms should be specified in the donor letter, i.e., the exact amount of payments, intervals of payment, and when the pledge will be fulfilled. The gift form is processed with or without a payment.

12. GIFT RECEIVED: The amount the donor has donated or the first payment of a pledge.

13. GIFT-IN-KIND: The value of the property donated. Property cannot be processed without a value being assigned. The value is usually established by the donor. Indicate who established the value.

14. DEPARTMENTAL INSTRUCTIONS TO EXTRAMURAL ACCOUNTING: Type the fund name as it appears on your ledgers.

15. LEGACY ACCOUNT/FUND NO. Enter both the legacy loc/account/fund/sub number and the DaFIS account number. If the gift requires a **NEW** DaFIS account, cite the DaFIS account and legacy account with 90000 as the fund number. Enter the Account Maintenance document number used to create the DaFIS account. Gift Acceptance will request the fund number from accounting prior to processing the gift.

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16. FORM PREPARED BY AND/OR CONTACT PERSON: Enter the name, department, and complete telephone number of the department contact person to whom questions can be directed.

17. SUBMITTED FOR ACCEPTANCE BY: Enter the name and title of the individual who has delegation authority to submit gifts for acceptance on behalf of your department.

700U: Direct questions to Office of Research and refer to Sponsored Research Manual, Section 305.

IF YOU HAVE ANY QUESTIONS REGARDING GIFT PROCESSING ISSUES, PLEASE CONTACT THE GIFT ADMINISTRATION UNIT IN ADVANCEMENT SERVICES AT (530) 754-1133.