



DISBURSEMENT REQUEST INSTRUCTION SHEET

Please use the following instructions when completing and submitting a Disbursement Request Form for your program. Any missing documents or incomplete information will delay the processing of your request. Each payee in your submission will require a **separate** Disbursement Request Form. All complete submissions are processed in 3 to 5 business days and mailed via USPS First Class mail unless Expedited Processing or a Delivery Option is selected. **United Charitable must receive electronic copies all necessary receipts and invoices** in order to process each payment or reimbursement. Bank or credit card statements will not be accepted.

Submission - All Disbursement Requests must be submitted via email to info@unitedcharitable.org or by Fax (866) 837-7874. We are unable to accept mailed copies of submissions.

- 1. Program Information:** Enter your program's name and account number in their respective fields at the top of the form.
- 2. Payee Information:** Enter the Payee's name, address and total amount requested for payment or reimbursement. Then select where the check should be sent – to Payee or to a Separate Address. If a Separate Address is chosen, please indicate the address in the space provided.
- 3. Special Processing and Delivery:** This section is optional. Our normal processing time is 3-5 business days. If the requested payment or reimbursement needs to be processed and/or delivered to the recipient faster than this, please select from these options (fees are subject to change):
 - Processing*:** Expedited 1-2 Business Days - \$15 Fee - Form must be received by 10am ET
 - Delivery*:** * **Each payee's selected processing option fee will be charged to the program**
 - FedEx – Overnight, 2-Day & Express Saver rates vary by location and service
 - Priority Mail – \$6.45 Fee – USPS delivery time of 2 - 4 business days
 - Domestic Bank Wire Fee – \$25 (Wire instructions must be included.)
 - International Wire Fee – \$50 (Wire instructions must be included.)
- 4. Activity Codes:** Each recipient and invoice should be divided into the activity code that correctly defines the expense. Once the amount for each activity code is totaled, indicate this sum in the amount field next to the appropriate activity code. For a complete list of activity codes and definitions, please see the Activity Code Definition Sheet.
- 5. Justification:** Please explain how the expenses presented on the form further your program's charitable purpose (i.e. the supplies purchased are being used to build a school in Ghana).
- 6. Memo:** Note to be placed on the check memo line. If you're paying a bill, you would place the invoice and account number here.
- 7. Program Manager Attestation:** Print and sign your name attesting that you understand the required statement concerning IRS Regulations presented at the bottom of the form. Please include your phone number and email address, so that we may contact you with any questions or concerns. If we are unable to reach you, this may delay the processing of your request.