

# OREGON STATE HOSPITAL

## POLICY ATTACHMENT

---

**PROCEDURES B:** Signature Authority Delegation **POLICY: 1.016**

---

**POINT PERSON:** Superintendent

---

**APPROVED:** Superintendent **DATE: APRIL 13, 2023**

---

**SELECT ONE:**

<input checked="" type="radio"/> New policy attachment	<input type="radio"/> Minor/technical revision of existing policy attachment
<input type="radio"/> Reaffirmation of existing policy attachment	<input type="radio"/> Major revision of existing policy attachment

---

### I. SIGNATURE AUTHORITY AT OREGON STATE HOSPITAL (OSH)

- A. Signature authority for OSH and Pendleton Cottage is granted within standardized authority limits established by the OSH Chief Financial Officer based on a tiered system consistent with hospital organizational structure and business need. Not all requests for signature authority will be authorized.
1. OSH Executive Team members are the only staff authorized to sub-delegate financial authority. Management staff with signature authority may sub-delegate timesheet approvals.
  2. As a rule, managers and department heads should be the only staff with financial authority. Exceptions may be granted on a case-by-case basis depending on department and position needs.
    - a. Exception requests must be submitted to OSH Signature Authority and be approved by the Chief Financial Officer.
    - b. Represented staff will not be granted authority to commit or release funds.
  3. Questions regarding standardized authority limits, sub-delegation limits, or signature authority processes may be directed to OSH Signature Authority via email.
- B. Signature authority must be approved and documented with Shared Services Office of Financial Services prior to staff signing and approving forms or documents with financial implications on behalf of OSH or Pendleton Cottage. Signature authority is required to sign documents including, but not limited to:
1. Payments (invoice/contract)
  2. Contract authorizations
  3. Purchase orders

4. Travel advances
  5. Travel claims
  6. Small Purchase Order Transaction System (SPOTS) card applications and logs
  7. Time capture/leave slips
  8. Other internal documents with financial implications
- C. Staff must complete the Delegated Signature Authorization (MSC 286) form maintained by Shared Services Office of Financial Services to request initial delegated signature authority and when delegated signature authority must be changed, such as during a staff promotion or when a staff separates from OSH.
1. Shared Services Office of Financial Services requires that staff physical signatures be on file for signature authentication purposes. Forms must be physically signed by staff. Forms electronically signed will not be accepted or processed.
  2. If a staff separates from OSH or Pendleton Cottage, managers are responsible to ensure that delegated signature authority is immediately revoked by contacting OSH Signature Authority via email.
  3. If a staff promotes within OSH or Pendleton Cottage, managers are responsible to ensure that any current delegated signature authority is immediately revoked and reissued within new appropriate standardized authority limits, as applicable, by contacting OSH Signature Authority via email.
  4. Emails to OSH Signature Authority requesting initial signature authority or signature authority changes must contain the following information:
    - a. Staff's full name
    - b. Staff's OR number or other state identification number
- D. Completed forms must be submitted to OSH Signature Authority via email for processing.
1. OSH Signature Authority serves as the conduit between OSH and Shared Services Office of Financial Services. Forms not submitted to OSH Signature Authority may not be processed.
  2. OSH Signature Authority screens requests and may reject forms that are not complete, not correct, or not appropriate per parameters established by the Chief Financial Officer's tiered system.

3. OSH Signature Authority informs requestors via email when the submission process is finalized and when staff may begin signing forms and documents within their approved authority.
- E. Completed forms must be retained in staff manager personnel files per the record retention requirements for staff personnel records.