Workshop Agenda

- Welcome
- Funding Process
- Types of Paperwork
- Collecting Money
- Questions
Where To Get Help & Answers

- [www.sa.sc.edu/sg/so](http://www.sa.sc.edu/sg/so)

- Megan Denny
  Assistant to the AVP
  [sofinanc@mailbox.sc.edu](mailto:sofinanc@mailbox.sc.edu)

- Ian Shannon
  Student Body Treasurer
  [sasgtrean@mailbox.sc.edu](mailto:sasgtrean@mailbox.sc.edu)
Background

Campus Activity Fee
Background

Campus Activity Fee

Student Activity Fee (SAF)
Background

Campus Activity Fee → Student Activity Fee (SAF) → Senate Finance Codes & University Policy → $\$ Allocated
Qualifying for Funding

STEP 1
Organization must be registered through the Leadership and Service Center

STEP 2
Treasurer must attend a Treasurer Workshop each academic year

STEP 3
Treasurer must submit completed budget submission online through Student Organization System (SOS) according to proper timeline

STEP 4
Budget requests must be SIGNED by advisor and uploaded to SOS before submitting your budget
What is considered for funding?

- **University-wide Programs**
  - Must be open to the entire University community
  - Must benefit the University community

- **Conference Travel**

- **Competition Travel**
## Non-Funded Items

<table>
<thead>
<tr>
<th>Item</th>
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<tbody>
<tr>
<td>Non-consumable items (Banners, games, office supplies, giveaways, etc.)</td>
</tr>
<tr>
<td>Clothing</td>
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<tr>
<td>Tips Exceeding 20%</td>
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<tr>
<td>Academic Journals</td>
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<tr>
<td>Private Lessons</td>
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<tr>
<td>Food for regularly scheduled meetings</td>
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<tr>
<td>Any type of cash reward (including gift cards)</td>
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<tr>
<td>Salaries for Staff or Graduate Assistants</td>
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<tr>
<td>Contributions to charitable organizations</td>
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<tr>
<td>Individual Memberships</td>
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</table>
Before you request funding...

Submit budget a minimum of 5 weeks prior to event

Reserve space

Obtain quotes or historical information for specific pricing

Speak with your Advisor
Budget Dialogues

Must meet with the Senate Finance Committee for:
- All requests over $500
- All travel requests

Dialogues are Tuesdays from 6:00pm – 8:00pm

RH 348 Sign up on SOS for specific dialogue time
How to Request a Dialogue

1. Log into SOS
2. Click on Organization Budgets
3. Select Undergrad 15-16 in the cycle drop down menu
4. Click Add Event
5. Enter event and funding information
6. Click Save
7. Click Budgets
8. Print your budget using the printer icon
9. Take the budget to your Advisor for their signature
10. Upload the signed budget to SOS
11. Submit
Spending Funds – Travel

Travel expenses will come out of pocket and are reimbursed.

7 days prior to travel (minimum)

- Complete TA (travel authorization) Form
- Signatures:
  - President/Treasurer
  - Advisor

7 days after travel

- Complete TRV (travel reimbursement voucher) Form
- Signature of Traveler
- All receipts turned in
Spending Funds – Travel

Travel Authorization (TA) Form

Travel Reimbursement Voucher (TRV) Form

www.sa.sc.edu/sg/so
Spending Organization Funds

When you want to pay a vendor ahead of time – not using your own money

- Find a vendor that will accept a Purchase Order (PO).
  - Call the vendor that you would like to use and ask if they accept POs from the University of South Carolina.

- Confirm with the Department of Student Life that the vendor is in our purchasing system.
  - If not, complete supplier onboarding packet OR choose another vendor in the system

- Once funding is approved: fill out Event Payment/Reimbursement Form at www.sa.sc.edu/sg/so

- Print the form.

- Obtain signatures of President/Treasurer AND Advisor.

- Submit to RH, Suite 115 a minimum of 3 weeks before your event.
  - Keep in mind holidays and University closure dates may impact processing time
Spending Funds: Getting Reimbursed
When you are paying out of pocket – *Completing paperwork after your event*

- **Complete & print:** “Student Reimbursement Info” Form
  - [www.sa.sc.edu/sg/so](http://www.sa.sc.edu/sg/so) (only need to do this once – per individual being reimbursed)

- **Fill out & print:** “Event Payment/Reimbursement” Form
  - [www.sa.sc.edu/sg/so](http://www.sa.sc.edu/sg/so)

- **Signatures on Event Payment Form:** President/Treasurer

- **Include with Forms:**
  - Original, itemized receipts
  - If food was served, an attendance list
  - Flyer from your event

- **Submit** *everything together* to Russell House, Suite 115
  - Keep in mind holidays and University closure dates may impact processing time
Spending Funds: Getting Reimbursed

“Student Reimbursement Info” Form

“Event Payment/Reimbursement” Form

www.sa.sc.edu/sg/so
Timelines and Deadlines

• **Original Receipts and Reimbursement Paperwork**
  - Due within 31 days of event

• **Travel Receipts and Reimbursement Paperwork**
  - Due within 7 days of returning from traveling
Collecting Dues/Revenue

Depositing funds into your University account:

- Email: sofinanc@mailbox.sc.edu
- Do not drop by or leave it with anyone else.
- Practice safe cash handling when collecting org funds.
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