

Updated July 24, 2017

Finance Training Manual



**STUDENT
COMMONS
AND ACTIVITIES**

Your Official How-To Guide to Help Your Student
Organization Become Successful with Utilizing
Student Activity Fee Funds

The USC&A Finance Training Manual is your official how-to guide to help you gain an understanding of what is required from your student organization in order to appropriately use funding approved from your appropriation funding committee.

The purpose of this manual is to help you and your student organization understand:

- ✓ financial responsibilities for student organizations (Pg. 3)
- ✓ criteria prior to accessing allocated funds (Pg. 4)
- ✓ applying for funding (Pg. 5)
- ✓ budget reallocation request (Pg. 10)
- ✓ generating revenue (Pg. 11)
- ✓ establishing an outside bank account (Pg. 11)
- ✓ submitting a purchase request (Pg. 12)
- ✓ paperwork submission deadlines (Pg. 20)
- ✓ paperwork submission checklist (Pg. 21)
- ✓ checking balance in RamsConnect (Pg. 24)
- ✓ vendor self-registration with eVA (Pg. 25)
- ✓ trademarks and licensing (Pg. 26)
- ✓ creating an invoice (Pg. 27)
- ✓ travel authorization (Pg. 30)

Any questions regarding the material presented in this manual can be addressed with the Coordinator for Student Organization Finance (CFSOF) at csof@vcu.edu.

Responsibilities of the Organization (as it relates to Finance)

We are here to assist with ensuring each finance request your organization submits is approved and processed in a timely manner. However, there are some things that we need you to take responsibility for to ensure each request is efficiently and effectively processed:

- **Communicate** – if there are exceptions to your purchase request submission, please immediately communicate with the Coordinator for Student Organization Finance
- **Submit Timely** – please ensure that all of the paperwork necessary for the purchase request is turned in according to outlined deadlines
- **Educate ALL Organization Members** – finance-approved officers (president and treasurer) must educate all organization members on appropriate financial processes

It is the organization's responsibility to contact the vendor you are ordering goods and/or services from. Your organization must:

- obtain the initial quote for the goods and/or services you are requesting
- place the order for the goods and/or services.
 - Exception: If your order will be paid with a credit card by USC&A Staff, then you will work with your Account Specialist to place and pay for the order.
- obtain the final invoice from the vendor and provide to the corresponding Account Specialist to ensure there is not a delay in vendor payment and purchase request completion
- advise the vendor that they will be paid by check 30 days after Accounts Payable receives the invoice and confirmation of goods received (generally with a packing slip received with order)
 - It is your responsibility to work with the vendor to ensure that payment is processed in a timely manner to vendors. Please collaborate with your vendor to ensure they are self-registered in eVA and provide VCU a copy of their W-9.
 - If your student organization is requesting a check reimbursement, it is your responsibility to make sure that your student organization is self-registered in eVA and provide VCU a copy of your W-9.

eVA Self-Registration information can be found here:

<https://eva.virginia.gov/pages/eva-registration-buyer-vendor.htm>

Criteria Prior to Accessing Allocated Funds

Prior to accessing student organization funds granted by the Student Government Association, the following requirements must be met:

- Must be a registered student organization for the current school year
- Must have access to RamsConnect (<https://vcu.campuslabs.com/engage/>)
 - You will need to use your VCU eID to login
 - The student organization's President is responsible for updating the roster
- All Presidents and Treasurers are required to complete the USC&A Online Finance Training and to complete the USC&A Finance Quiz with a passing score of 80 to be USC&A Finance Approved
 - The students who complete this training are the officers responsible for authorizing the spending of student organization funds. It is the responsibility of the trained officers to educate all student organization members on the appropriate financial processes.
- All funds awarded will be accessible in RamsConnect throughout the current school year.
 - For any programming and travel funds, any changes to the date will need to be approved in accordance with the Appropriations Committee prior to the original date
 - Spring funds DO NOT roll to Fall
- Funds cannot be used for any expenditures before the first day of class or after the last day of class of the fall and spring semester on each campus
 - For student organizations on the Monroe Park Campus, you have until the last day of classes on the Monroe Park Campus to use your awarded funds
 - For student organizations on the MCV Campus, you have until the last day of classes on the MCV campus to use your awarded funds
- Funds have to be used for the current fiscal year (July 1 –June 30)

VCU SGA Appropriations

As of Spring 2017, Monroe Park Campus (MPC) and Medical College of Virginia (MCV) Student Government Associations (SGA) merged together and became **VCU SGA**. With this change also brings change in the funding structure for both campuses.

Starting Fall 2017, there will be one Appropriations Committee that will oversee funding requests for both MPC and MCV student organizations. Because students across both campuses pay different Student Activity Fee amounts, you will notice that funds are different between undergraduate and graduate student.

The new VCU SGA funding model will begin Spring 2018. For more information on this, please visit this link: <http://www.sga.vcu.edu/funding-requests/>

When you apply for funding through the VCU SGA, keep in mind that:

- your organization has to be a registered VCU student organization by all registration requirements with the Student Leadership and Involvement Center
 - brand new organizations or organizations that have been inactive for at least one year, must be registered for the current school year for at least 30 days before applying for funds
- adhere to the deadlines that are associated with the funding type your organization plans to request
 - all funding requests are submitted through VCU SGA's website: (<http://www.sga.vcu.edu/funding-requests/>)

This finance training manual will provide you an overview of funding that is available through VCU SGA and some of the requirements. It is recommended that you also review the VCU SGA bylaws, which goes into more detail about the requirements for requesting and using VCU SGA funding. You can access the bylaws on VCU SGA's website: <http://www.sga.vcu.edu/funding-requests/>.

Operational, Events and Travel Deadlines

For Events, or Travel Dates in:	Deadline
Fall Semester	April 1, 11:59PM
Spring Semester	October 1, 11:59PM
Summer Semester	March 1, 11:59PM

Funding Types – VCU SGA

- **Operational funding** is used to help the organization to run smoothly and for daily expenses. Operational funds cannot be used for any program or travel-related expenses
 - Undergraduate student organizations may request up to \$500.00 per academic year.
 - Graduate and professional student organizations may request up to \$100.00 per academic year.
- **Travel funding** is used for conferences, competitions, and activities to help promote VCU.
 - Undergraduate student organizations may request up to \$2,500.00 per academic year.
 - Graduate and professional student organizations may request up to \$2,000.00 per academic year.

VCU SGA will only allow up to **\$500.00 per student** for travel. Even though travel funding may be awarded, the student organization is required to complete USC&A Travel Authorization paperwork through the Student Leadership and Involvement Center prior to the travel. The travel authorization has to be completed and turned in **at least 30 days** prior to your departure date of travel. Failure to do so will result in VCU denying your request to use funding for travel.

- **Programming funding** is used to help organizations fund an event.
 - Undergraduate student organization may request up to \$10,000.00 per year.
 - Graduate and professional student organizations may request up to \$4,000.00 per year.
 - Co-sponsored programs, student organizations will have a maximum allowed of \$15,000.00.
 - Any student organizations requesting at least \$1,000.00 and will have their event in the University Student Commons and Activities are required to meet with an event planner at least 90 days before the program is scheduled.
 - Appropriations will be implementing additional limits on programming funding based on projected attendance for your program:
 - Programming with less than 50 people expected may request up to \$1,000.00 per program.
 - Programming with more than 50, but less than 151 people may request up to \$2,000.00 per program.
 - Programming with more than 150 may request:
 - Up to \$5,000.00 for undergraduate student organizations
 - Up to \$4,000.00 for graduate and professional student organizations
- For your event to be considered for funding from MPC SGA Appropriations your event must be:
 - Open and accessible to the entire Monroe Park Campus student body.
 - Free to attend. Your student organization cannot charge students to attend the event.
 - The event must support the entertainment, cultural, and social mission of the Student Activity Fee.
 - Any changes to the event (date of the event, title of the event), must be made through VCU SGA Appropriations before any purchase requests are submitted.
- **Fundraising Programs** is programming with the purpose of raising funds for a third-party non-profit philanthropic organization.
 - 100% of all proceeds must be donated to a third-party non-profit philanthropic organization.
 - A complete Expenditure and Donation report is due to the Assistant Treasurer within 30 days after the event.

Applying for Funding Graduate Student Association (GSA) Appropriations Committee

If your organization is considered a graduate student organization, you will apply for funding through the Graduate Student Association Appropriations Committee. When you apply for funding through the Graduate Student Association Appropriations Committee, keep in mind:

- your organization has to be a registered VCU student organization with the Student Leadership and Involvement Center
- the Graduate Student Association Appropriations Chair will provide your organization with the budget request form
- you will be applying for funding for the entire school year
- you must adhere to the funding request deadline established by the Graduate Student Association Appropriations Committee; late submissions may be subject to a late penalty fee

This finance training manual will provide you an overview of funding that is available through GSA Appropriations Committee and some of the requirements. It is recommended that you also review the GSA Appropriations Committee bylaws, which goes into more detail about the requirements for requesting and using GSA Appropriations funding. You can access the bylaws on VCU Graduate School's website: <http://www.graduate.vcu.edu/life/association.html>.

Applying for Funding Fraternity and Sorority Governing Councils Finance Committee

If your organization falls under the Fraternity and Sorority Life Governing Council, then you will apply for funding through the Fraternity and Sorority Life Governing Council Finance Committee.

- Your organization has to be a registered VCU student organization with the Student Leadership and Involvement Center (NOTE: new organizations will have to be registered for at least 3 months before applying for funds through the Fraternity and Sorority Life Finance Committee)
- All submissions will be done online (see instructions below)
- Communication will be sent to chapter presidents about funding request due dates and information sessions on how to submit funding requests
- Chapters will be notified, before the end of the spring semester, as to how much they have been awarded for the next academic year

This finance training manual will provide you an overview of funding that is available through FSL Finance Committee and some of the requirements. It is recommended that you also review the FSL Finance Committee guidelines, which goes into more detail about the requirements for requesting and using GSA Appropriations funding.

To ensure that your organization is awarded funding, please follow the steps below:

- Download the new form:
<http://www.scribd.com/doc/204366119/Semester-Budget-Request-Blank>
- Complete the form
- Submit the completed form through RamsConnect:
- <https://vcu.campuslabs.com/engage/actioncenter/organization/fraternityandsororityleadershipteam/forms>
- You will be contacted by the Finance Committee, once your application has been verified, to schedule an appointment
- The Finance Committee will meet with a representative from your organization to discuss your proposed budget
- You will be contacted by the Finance Committee after a decision has been made

How to Create a Budget Reallocation Request

If you need to reallocate funds (move funds around) from one line item to another, you are able to do that in RamsConnect.

Note: Each Appropriations committee has specific guidelines for budget reallocations. Please communicate with your Appropriations committee about approval prior to any budget reallocation.

Important Things to Remember about Budget Reallocation

- Reallocations totaling less than 10% of the total budget awarded will be reviewed and processed by the Coordinator for Student Organization Finance within two business days
- Reallocations exceeding \$500.00 or over 10% will be reviewed by the appropriate funding committee for approval
- Student organizations CANNOT reallocate funds from the spring to the fall semester
- Funds can only be moved into Accounts that have been previously funded, unless otherwise approved by your Appropriations Committee
- You cannot reallocate funds from a Complex Event Grant to cover Operational or Travel. However, you can reallocate funds to cover unexpected costs from Operational for your Complex Event
- You cannot reallocate funds to and from Event/Program, or Travel (unless pre-approved by an appropriate funding committee)
 1. Log into RamsConnect
 2. Select USC&A Budget Reallocation Request Form under Campus Links
 3. Complete each box
 4. Click "Submit"

The request is sent over to the Coordinator for Student Organization, Finance. If everything is in order, your request will be approved and funds reallocated in RamsConnect. If the budget reallocation request is denied, an email will be sent to the requestor noting the denial reason. The most common reasons include:

- No funds available in your RamsConnect account
- No funding awarded to line item
- Unable to reallocate to and from Event and Travel Grant

Generating Revenue (Outside Bank Account)

Student organizations are encouraged to practice fundraising. This will allow your organization more flexibility in planning its events and utilizing funds.

- Student Activity Fee funds granted by VCU must be kept in a University account and have to be used based on USC&A and VCU standards
- Group generated funds may be either kept in the university account (subject to VCU/State of Virginia procedures) or in an outside bank account and can be used for whatever purpose the organization chooses

Establishing an Outside Bank Account

To open a bank account under your organization's name, the organization must have a federal tax ID number (similar to SSN) for your organization. This is not regulated by University Student Commons and Activities as we do not get involved in any legal responsibilities of your organization. Apply for a federal tax ID number by going to

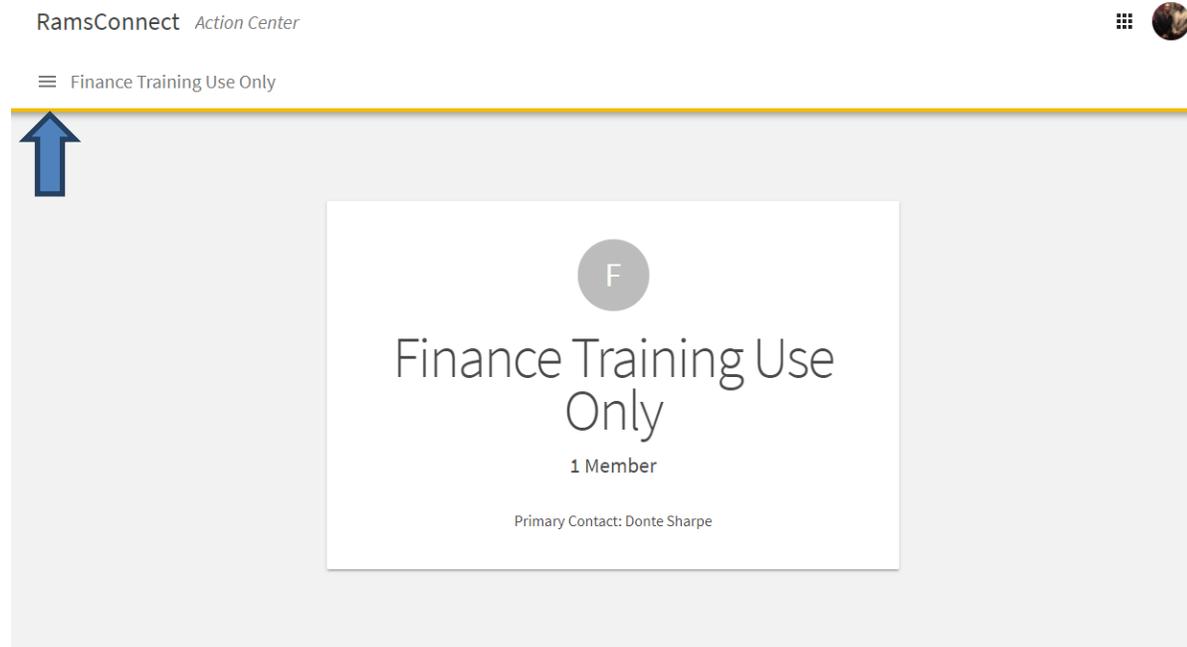
<https://www.irs.gov/businesses/small-businesses-self-employed/employer-id-numbers-eins>

Student organizations are prohibited from establishing outside bank accounts with "Virginia Commonwealth University" or "VCU" in the name. Student organizations are prohibited from using Virginia Commonwealth University's tax ID number.

Submitting a Purchase Request

A purchase request is required for **every payment transaction** that uses student organization funds. Only the President and Treasurer will have access to RamsConnect, after receiving USC&A Finance Approval.

- Log into RamsConnect with your VCU eID and password (<https://vcu.campuslabs.com/engage/>)
- Go to your student organization's RamConnect page (you can find it under "My Memberships" on the home page)
- Click "Manage Organizations"
- Click "Organization Menu"



RamsConnect *Action Center* 

☰ Finance Training Use Only

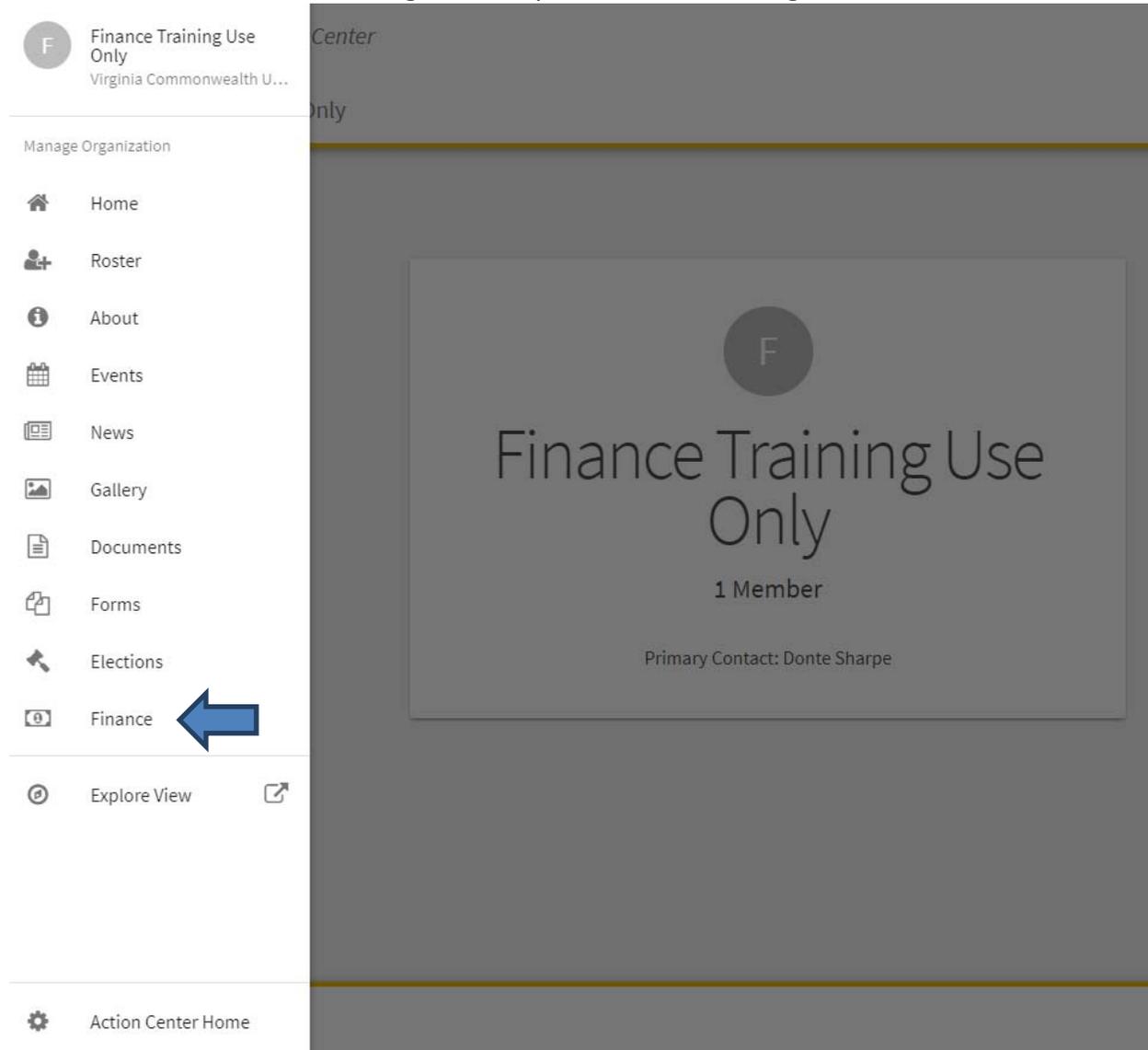


Finance Training Use
Only

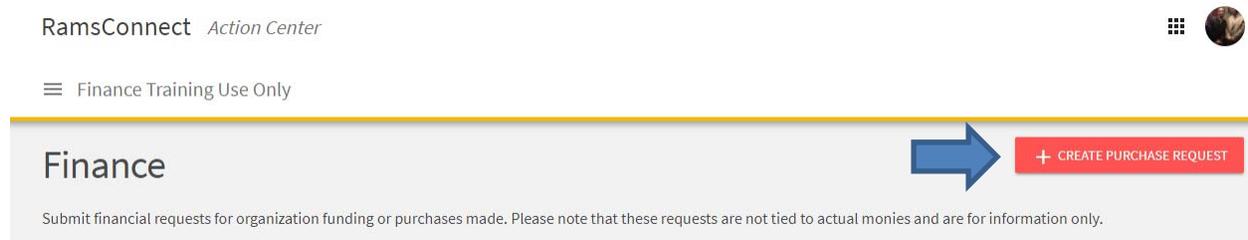
1 Member

Primary Contact: Donte Sharpe

Here is the list of tabs for each organization you will see under Organization Menu:



- Click "Finance"
- Click "Create Purchase Request"



- Fill out every section with exactly what is necessary

Request Details

<p>* Subject</p> <input type="text"/>	<p>* Requested Amount</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 10%; text-align: center;">\$</td> <td style="width: 90%; text-align: center;">0</td> </tr> </table>	\$	0
\$	0		
<p>* Description</p> <div style="border: 1px solid #ccc; height: 40px;"></div>			
<p>* Account</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0; display: inline-block;">SELECT...</div>			
<p>* Categories</p> <div style="border: 1px solid #ccc; padding: 2px;"> ---- Select Category ---- ▼ </div>			

- Request Details
 - Subject: 10 words or less that easily identifies what you are requesting. ****Include the event date****
 - Requested Amount: the amount of money you are requesting. This should match all other paperwork, quotes, invoices, or receipts. A difference in amount could result in denial of purchase request.
 - Description: the specific details of what is being ordered
 - Account: the account you would like to use to pay for the request and funds are available
 - Click ‘Select’
 - Select which account you want the money to come out for your purchase request
 - **Equipment** – owned or rental equipment
 - **Facilities** – room rental, off-campus facility rental, etc.
 - **Food** – food or food supplies (do not forget to include gratuity, which is limited to 20% of the total bill)
 - **Miscellaneous** – any expense that does not fit in another category
 - **Personnel/Services** – DJ, AV Tech, speaker, band, etc.
 - **Publicity** – promotional items
 - **Supplies** – name tags, specialized paper, etc.
 - **Travel** – registration, transportation, lodging, etc.

* Categories

---- Select Category ----

---- Select Category ----

- Electronic Purchase Order (Non-Internet Vendors, ICAs, Honorariums, Contracts)
- Reimbursement (To A Person)
- Journal Voucher (Air/Rail, DSA, Other VCU Departments)
- Credit Card Order by USC&A Staff (Office Supplies, Printing, Internet Vendors <\$5K)
- Balance Wipe (FINANCE STAFF USE ONLY)
- Revenue Refund (FINANCE STAFF USE ONLY)
- Payroll (FINANCE STAFF USE ONLY)
- Awards (FINANCE STAFF USE ONLY)
- Reimbursement (To Student ORG Outside Bank Account)

- Categories: advises the Account Specialist how to proceed with processing payment
 - **Electronic Purchase Order:** a request for payment of a contract or invoice; this is a confirmation that VCU will pay for goods/services with a check, 30 days after Accounts Payable has received the final invoice and confirmation that goods/services have been received
 - **Reimbursement:** either an individual or your student organization is getting reimbursed for a purchase; Accounts Payable will issue a check 30 days after paperwork has been received to the address on the submitted paperwork (generally direct deposited in the bank account on file for students/staff); every item purchased is not reimbursable; to understand what you can and cannot purchase, please visit:
<https://procurement.vcu.edu/i-want-to/make-a-purchase/know-what-you-can-and-cannot-buy/>
Purchases that are not reimbursable include, but are not limited to:
 - Alcoholic beverages
 - Tobacco products
 - Personal Purchases
 - Gift Cards
 - Gifts of any kind (if it can be interpreted as a gift, then do not purchase it)
 - All office supplies
 - The Supply Room Company is the only approved office supply vendor of VCU
 - Purchases made from ANY office supply store (including non-office items)
 - Travel not authorized at least 30 days in advance
 - Air and rail are must be arranged by our office for student organization travel
 - Pre-paid gas and rental insurance (from rental companies)
 - Any Coca-Cola products (Pepsi is the approved beverage vendor for VCU)
 - Any contracted services where the contract was not signed in advance by VCU
 - Honorariums (there is a specific procedure for handling honorarium payments)
 - Any type of regalia (including honor cords, graduation cords, cap & gowns, etc.)
 - **Reimbursement (To Student ORG Outside Bank Account):** to reimburse a student organization outside bank account

- **Journal Voucher:** reallocating funds from one student organization/department to another; if you are reallocating funds to reimburse an student organization/department that paid an invoice/expense, you will need to provide proof of payment; the student organization must be registered
- **Credit Card Order by USC&A staff:** VCU is placing the order and paying a vendor with a departmental credit card; generally used for online orders, office supplies, and travel-related purchase requests (airfare and/or conference registration); if you would like food to be purchased using a credit card, please note that VCU does not pay in advance for food; the food vendor will receive payment either the day of the event or the next business day (if the event falls outside of normal business hours)
- You will not need to use Balance Wipe, Revenue Refund, Payroll, or Awards for any transaction

Payee Information

First Name

Last Name

Street

City

State/Province

ZIP/Postal Code

- Payee Information: Who is getting paid? All the information should match the Quote/Invoice
 - For reimbursements, it is whoever is getting the money back AND incurred the expense

Additional Information

* Tax ID # or V Number (Do NOT insert SSN):

* Is this a Journal Voucher? (If "Yes", please provide 6-digit department index. Otherwise, type "N/A")

* Payee E-Mail Address **and** Phone Number:

*

For all food and travel purchases and reimbursements, a stated, approved **Business Purpose** and **Attendance** is required. Please provide both the approved Business Purpose and approximate attendance below. For Travel, provide the names of the travelers. **(if not a food or travel purchase, please enter N/A):**

- Additional Information
 - Tax ID or V Number: either the vendor's Tax ID or student's V# of who is getting paid
 - Payee E-Mail Address AND Phone Number: the vendor's or the person who is getting paid
 - Is this a Journal Voucher: If this purchase request is a journal voucher, then we need the 6-digit index number from the department where the funds will be going to
 - Business Purpose: what is the purpose of this event and who is going to be there (for food and travel-related requests); otherwise, put 'N/A'

Please upload all supporting documentation for this purchase request.

—

* Requestor Name and e-mail address (cannot be the same as the payee):

By submitting this purchase request, you are certifying that you are USC&A Finance Approved and all documentation and requested expenses are true and correct to the best of your knowledge and are for the legitimate business use of your student organization.

If this request will be printed and turned in, then you MUST turn into The Student Leadership and Involvement Center, Room 018.

If you are uploading your supporting documentation, keep all original documentation until purchase request is Completed.



[CANCEL](#)

- Now, you have the capabilities of uploading your supporting documentation to the purchase request. Please follow the order of the “Paperwork Submission Checklist” to have the documentation in order
- Requestor Name & e-mail address: your information (cannot be same as payee)
- Click ‘Submit Request’

From here, you will be redirected back to the Finance page. You will need to print out the purchase request that you submitted and turn it into the Student Leadership and Involvement Center (University Student Commons and Activities Room 018).

To print out the Purchase Request:

- Locate your Purchase Request on the “Finance” screen
- Click “Print” icon 
- Open the document
- Print the document

Sample Purchase Request

6/30/2017

Purchase Request: 1634189

Purchase Request: 1634189 - Unapproved

Organization: Finance Training Use Only
Contact: Donte Sharpe
Subject: Test
Account: Finance Training Use Only
Category: Electronic Purchase Order (Non-Internet Vendors, ICAs, Honorariums, Contracts)

Request No: 1634189
Submitted On: 6/30/2017 12:41 PM
Status: Unapproved
Requested Amount: \$100.00

Description: This is a test of how the purchase request print screen looks

Payee Information

First Name: 1 Vendor Co
Last Name:
Street: 123 Floyd St
City: Richmond
State: VA
ZIP Code: 22234

Tax ID # or V Number (Do NOT insert SSN):

12-3456789

Is this a Journal Voucher? (If "Yes", please provide 6-digit department index. Otherwise, type "N/A")

N/A

Payee E-Mail Address and Phone Number:

vendor@nomail.com, (804) 123-4567

For all food and travel purchases and reimbursements, a stated, approved Business Purpose and Attendance is required. Please provide both the approved Business Purpose and approximate attendance below. For Travel, provide the names of the travelers. (if not a food or travel purchase, please enter N/A):

N/A

Please upload all supporting documentation for this purchase request.

Requestor Name and e-mail address (cannot be the same as the payee):

Donte' Sharpe, csof@vcu.edu

By submitting this purchase request, you are certifying that you are USC&A Finance Approved and all documentation and requested expenses are true and correct to the best of your knowledge and are for the legitimate business use of your student organization.

If this request will be printed and turned in, then you MUST turn into The Student Leadership and Involvement Center, Room 018.

If you are uploading your supporting documentation, keep all original documentation until purchase request is Completed.

Stage History

Date	Stage	Comment	Changed By
6/30/2017	Stage 1 - Student Organization Submission		Donte Sharpe

Paperwork Submission Deadlines

In addition to following deadlines to apply for student organization funding, there are strict USC&A Finance submission deadlines for all student organizations:

- **45 Days in advance**
 - Purchase Requests for contracts (under no circumstance should you sign) and honorarium (speaker's fee should be inclusive of travel expenses; speakers will be responsible for making their own travel arrangements)
- **30 Days in advance**
 - Purchase Requests for payments to vendors (with the exception of contracts and honorariums); due 30 days prior to when the student organization needs the request (not when payment is due)
 - Travel Authorizations
- **Within 5 Business Days**
 - All reimbursements (event, travel, etc.)

Paperwork Submission Checklist

...For Standard

- Submitted Purchase Request
- Itemized quote for purchase

...For Reimbursement

- Submitted Purchase Request
- Itemized receipts showing paid (taped down to 8 ½ X 11 paper)
 - Do not tape over any of the characters on the receipt
- Bank statement showing charges posted/cleared (not “pending”)
- Copy of event flyer or copy of conference registration website (for travel-related request)
- [Non-Employee Reimbursement Form](#) (if applicable; only required to submit once)
- Student Organization Invoice (if applicable; for outside bank account reimbursement)

...For Contracts

- Submitted Purchase Request
- Itemized quote for performance

...For Food

- Submitted Purchase Request
- Itemized quote for purchase
- Invitation/Event Flyer (if necessary, can be turned in after the event has taken place)
- List of Attendees (if necessary, can be turned in after the event has taken place)

...For Honorarium

- Submitted Purchase Request
- Email from recipient agreeing to honorarium amount
- Honorarium Form (used to outline the honorarium amount and recipient; this form is not sent out to the recipient)
- Honorarium Acknowledgement (the signed letter sent out to the honorarium recipient to confirm the amount of the honorarium)

...for Journal Vouchers (J/V) to another department here at VCU

- Submitted Purchase Request
- Proof of payment
 - Copy of purchase order, or
 - Copy of Bank of America P-Card Statement
 - Copy of paid invoice

...For Office Supplies (The Supply Room Company)

- Submitted Purchase Request
- Printout of submitted Office Supply Order Form under Campus Links in RamsConnect (Be mindful, not every office supply can be ordered such as plain paper, pens, staples, etc.; these items are located in the Student Leadership and Involvement Center Room 018 in the University Student Commons and Activities)

...For Travel

- Submitted Purchase Request
- Signed USC&A Travel Authorization
- Conference Agenda
- Copy of Title IX Completion Certificate for the school year travel will be occurring from each member traveling

*****All purchase requests & related documents need to be turned in to Student Leadership and Civic Engagement in the University Student Commons and Activities*****

RamsConnect Stages

Stage 1 – Student Organization Submission = purchase request submitted

- Make sure all documentation for the purchase request has been uploaded to the purchase request in RamsConnect. If all of the documentation has not been provided, email all remaining documentation to: cfssof@vcu.edu. Your purchase request number must be in the Subject line of your email.
- We will still accept physical versions of purchase requests. The purchase request and supporting documentation must be turned into the Student Leadership Corner (formerly known as Common Ground in the Student Commons) within the finance office's deadlines.
- If the proper documentation is correct, the request was turned in within our deadlines, and the funding is available at the time of submission, then the Coordinator for Student Organization Finance will approve your request and update to Stage 2 in RamsConnect
- Status – used in the RamsConnect system to communicate the status of a purchase request.
 - **Unapproved:** usually, a purchase request is unapproved because:
 - paperwork has not been printed and turned into the Student Leadership and Involvement Center (University Student Commons and Activities, Room 018)
 - documentation is missing
 - **Approved:** purchase request has been approved and submitted for further processing
 - **Denied:** usually, a purchase request is denied because:
 - funding was not available
 - beyond the deadline for submission
 - **Cancelled:** either the student organization or authorized individual has cancelled the purchase request prior to submission.
 - **Completed:** purchase request is complete and the vendor/individual has been paid

Stage 2 – Account Specialists Assigned = request has been approved

- The Coordinator for Student Organization Finance will deliver the request to the Account Specialist to process

Stage 3 – Order/Reimbursement Confirmation = confirmation that VCU will pay the vendor or individual will be reimbursed

- Contact your vendor to confirm your order and provide the confirmation# in RamsConnect
- Reimbursements/Journal Vouchers do not require your confirmation

Stage 4 – Action Required = awaiting confirmation from the student organization that the goods/services were received, event happened, or food delivered

- Once you receive your order, send an email to your Account Specialist confirming
 - goods/services received
 - event happened
 - food received (all food requests must include the event flyer and attendance list)
- Make sure you get a final invoice from your vendor and send to the Account Specialist (not required for reimbursements)

Stage 5 – Payment Processed = payment processed

- Upon receipt of the final invoice, a check will be generated and sent out to the vendor within 60 days (not required for reimbursements)

Checking Balance in RamsConnect

A benefit you have with RamsConnect is that you are able to view how much funding you have to spend. Your organization can access the amount of funding in RamsConnect by clicking the “Finance” tab and the “Accounts” tab.

- **Balance**: the current balance in the account
- **Available Funds**: the real-time amount that is available for the student organization to use

Finance + CREATE PURCHASE REQUEST

Submit financial requests for organization funding or purchases made. Please note that these requests are not tied to actual monies and are for information only.

PURCHASE REQUESTS ACCOUNTS

Name	Description	Parent	Balance	Available
Finance Training Use Only	Finance Training Use Only		\$0.00	\$0.00



Self-Registration with eVA

VCU Procurement requires that each new vendor is registered in eVA. Unless information has changed for the vendor or your student organization, self-registration in eVA is required only once. To confirm whether or not your particular vendor is registered, complete a vendor search at this link:

https://logi.eproc.gipdc.com/External/rdPage.aspx?rdReport=Public.Reports.Report9001_Data



Return to eVA Home Page

Search View All Check to use 'Name starts with' search logic.

Vendor names starting with: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Others](#)

First 1,000 vendors listed

To navigate buttons or enter page# and click your TAB key.

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If the vendor is not registered in eVA, follow this link to complete the eVA vendor registration process: <https://eva.virginia.gov/pages/eva-registration-buyer-vendor.htm>

Once registration is complete in eVA, VCU needs a copy of the vendor's W-9. If the vendor does not have a W-9 to provide, then the vendor can complete the Commonwealth of Virginia [Substitute W-9](#) form and provide to the student organization. The student organization can scan the completed W-9 or Substitute W-9 to csof@vcu.edu so that the vendor can be created in VCU's accounting system.

For any questions or concerns regarding self-registration in eVA, please contact eVA Customer Care: (866) 289-7367

Trademarks and Licensing

As a student organization, you are able to apply for funding towards publicizing your student organization. We also understand that you would like to display your organization with pride and, at times, you may want to include a VCU logo or trademark.

To ensure you are properly following guidelines, anything bearing VCU's key trademarks will need to be purchased from a licensed vendor.

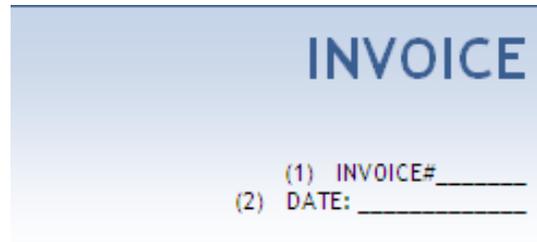
Key VCU trademarks include:

- Virginia Commonwealth University®
- VCU®
- VCU Rams™
- Rams™
- Medical College of Virginia™
- MCV™
- VCU Health System™
- Havoc™

For additional questions or concerns, please visit the VCU Trademarks & Licensing website:
<http://www.bsv.vcu.edu/trademarks-and-licensing/>

Creating an Invoice

If you are interested in reimbursing your student organization's outside bank account, follow these steps to create an invoice.



Invoice: Use the RamsConnect Purchase Request #

Date: Use date invoice prepared

Student Organization Name

PO Box 842032
Richmond, VA 23284
Contact number#

Student Organization Name: Put your organization's name & contact information, but keep the address as is on the sample Invoice (PO Box 842032, Richmond, VA 23284). Be sure to type your contact number.

(3) **NAME OF ORGANIZATION**
REMIT **Address**
TO:

Banner Index #
Tax ID# of Organization

Remit To: Your organization's payee information

Name of Organization: Your Organization

Address: The address that you have in Banner

Banner Index #: Your 8-ledger index # in RamsConnect

Tax ID #: The tax ID# that you used to open your outside bank

(4) JOB	PAYMENT TERMS
EVENT NAME: BUSINESS PURPOSE: NUMBER OF ATTENDEES:	Due on receipt

Job: The detailed information regarding the event

Event Name: What was the name of your event?

Business Purpose: Why did you have your event?

Number of Attendees: How many people were at your event?

(5) DESCRIPTION	TOTAL
List expenses by date	
	TOTAL DUE _____

Description: The details of what your organization is being reimbursed for

List expense by date: the detailed list of the items we are reimbursing

Total: the amount for that item, as it shows on your organization's bank statement.

INVOICE

Sample Completed Invoice

INVOICE # 1620123
DATE: __07/01/2017__

ABC Organization

907 Floyd Ave.
P.O. Box 842032
Richmond, VA 23284
Contact number# 804-123-4567

REMIT TO: **ABC Organization**
907 Floyd Ave.
P.O. Box 842032
Richmond, VA 23284

Banner Index # 880777
Tax ID# of Organization: 12-3456789

JOB	PAYMENT TERMS
EVENT NAME: Welcome Back 2017 BUSINESS PURPOSE: The purpose of this event was to welcome back students to VCU and to also promote our organization to new students NUMBER OF ATTENDEES: 150	Due on receipt

DESCRIPTION	TOTAL
List expenses by date	
Dollar Tree: 08/22/2013 (purchased supplies to create party favors for our attendees)	\$50
Kroger: 08/22/2013 (purchase refreshments for our event)	\$100
804 Catering: 08/25/2013 (used to provide hors d'oeuvres for our attendees)	\$200
TOTAL DUE	\$350

Travel Authorization

- USC&A Travel Authorization paperwork are due at least 30 days prior to travel to Student Leadership and Civic Engagement. You are encouraged to submit paperwork as early as possible.
 - RamsConnect Purchase Request
 - USC&A Travel Authorization – Cover Sheet for Travel Authorization Packet
 - Travelers Statement of Responsibility and Authorization – signed by each member traveling
 - Travel Waiver – signed by each member traveling to authorize GPA check
 - Copy of Title IX Completion Certificate for the school year travel will be occurring from each member traveling

The minimum GPA requirement for travel utilizing any student organization funding is a 2.5.

- Airfare and rail
 - should be arranged by the USC&A Finance Office
 - We encourage student organizations to turn in all travel authorization and purchase requests related to airfare early. Prices for airfare change daily and VCU does not have any control over price changes. Any differences for airfare will be the responsibility of the student organization
 - VCU has a contract through Christopherson Business Travel. Any travel arrangements we book has to be through them. There is an administrative fee, in addition to the cost of flight/rail
- Registration
 - can be arranged and paid for by the student organization for reimbursement by the USC&A Finance Office (submit reimbursement paperwork within 5 business days after returning from the trip)
- Lodging, rental car, and gas
 - will have to be arranged and paid for by the student organization for reimbursement by the USC&A Finance Office (submit reimbursement which should include receipts and conference agenda/flyer paperwork within 5 business days after returning from the trip)
 - lodging or meals should not exceed the General Services Administration Per Diem <http://www.gsa.gov/portal/content/104877> (you will be reimbursed the conference hotel rate if you lodge at the conference hotel); VCU will not reimburse you for any overage
- Traveling Abroad
 - Students traveling abroad with a VCU student organization must complete the Global Education Office's online travel registry here: https://vcu.studioabroad.com/index.cfm?FuseAction=Abroad.ViewLink&Parent_ID=0&Link_ID=7437B6CA-5056-BA1F-7300FCA776DFD244
 - Contact VCU Education Abroad at abroad@vcu.edu or 827-7882 if you have any questions

Important Things to Remember

- Each separate payment transaction must have a purchase request attached.
- Each separate payment transaction must be printed & turned in to the Student Leadership and Involvement Center (University Student Commons and Activities, Room 018). Failure to do so could result in delay/denial of your purchase request.
- Any email correspondence to the USC&A Finance Team regarding a specific purchase request, must include the purchase request # in the Subject line of your email. Be sure that your contact information is up to date and be mindful to respond to emails in a timely manner.
- Be sure to make copies of the paperwork submitted.
- When an organization is awarded funding, the funds are loaded into the organization's RamsConnect account, NOT the organizations outside bank account. If you have been approved for funding but do not see it in RamsConnect when you are ready to enter a purchase request, STOP and contact the Coordinator for Student Organization Finance (CFSOF) at cfssof@vcu.edu.
- Do not use your social security number on any forms. You may only use your V# on forms that require a number identifier.
- Any missing documentation for a specific purchase request needs to be turned in, within 7 days, to the Student Leadership Involvement Center Room 018 in the University Student Commons and Activities.
- Under no circumstance should your organization sign any contract.
- Organizations are not VCU. So organizations should not represent VCU.

Important Links

- **University Student Commons and Activities Finance Page**
<http://www.usca.vcu.edu/finance/>
- **RamsConnect**
<https://vcu.campuslabs.com/engage/>
- **Know What You Can and Cannot Buy**
<https://procurement.vcu.edu/i-want-to/make-a-purchase/know-what-you-can-and-cannot-buy/>
- **Ordering Office Supplies (The Supply Room Company (TSRC))**
<http://www.ecinteractiveplus.com/4687/>
- **eVA Vendor List** (To Confirm Whether or Not Your Vendor is Registered in eVA)
https://logi.epro.cgipdc.com/External/rdPage.aspx?rdReport=Public.Reports.Report9001_Data
- **eVA Registration**
<https://eva.virginia.gov/pages/eva-registration-buyer-vendor.htm>
- **Commonwealth of Virginia Substitute W-9 Form**
<https://procurement.vcu.edu/i-want-to/pay-a-vendor/>
- **Non-Employee Reimbursement Form**
<https://procurement.vcu.edu/i-want-to/travel/>
- **Applying for Tax ID Numbers (IRS.gov)**
<https://www.irs.gov/businesses/small-businesses-self-employed/employer-id-numbers-eins>
- **Virginia Commonwealth University Student Government Association (VCU SGA)**
<http://www.sga.vcu.edu/>
- **Monroe Park Campus Student Government Association (MPC SGA)**
<http://www.vcusga.org/appropriations/>
- **Medical College of Virginia Student Government Association (MCV SGA)**
<http://mccvcampussga.com/funding-requests>
- **Graduate Student Association (GSA)**
<http://www.graduate.vcu.edu/life/association.html>
- **Fraternity and Sorority Life (FSL)**
<http://www.usca.vcu.edu/fraternity-sorority-life/chapter-resources/>
- **GSA Per Diem Rates**
<http://www.gsa.gov/portal/content/104877>
- **VCU Trademarks & Licensing**
<http://www.bsv.vcu.edu/trademarks-and-licensing/>

Important Contacts

David Greene (dlgreene@vcu.edu)

Director, University Student Commons and Activities

Kaitlin Griffith (kgriffith@vcu.edu)

Interim Assistant Director, Student Leadership and Involvement

Heather Nunes (hnunes@vcu.edu)

Assistant Director, Student Leadership and Civic Engagement

DaNika Robinson (drobinson5@vcu.edu)

Assistant Director, Finance and Administration

Donte' Sharpe (csof@vcu.edu)

Interim Coordinator for Student Leadership and Civic Engagement

Tierrie Jones (tdjones@vcu.edu)

Account Specialist, Senior

Marchelle Key (mkey@vcu.edu)

Account Specialist

LaDarius Thompson (ldthompson@vcu.edu)

Student Government Association Advisor

Virginia Commonwealth University Student Government Association (VCU SGA)

Appropriations (sgafunding@vcu.edu)

Fraternity and Sorority Life (FSL) Finance Committee

(vcu.fsl.financecommittee@gmail.com)

Graduate Student Association (GSA) Appropriations Committee

(lett33@mymail.vcu.edu)