# How to Submit SGA Funding Forms via OrgSync

Log in to OrgSync with your ID/password (each member needs to create/setup their own profile then ask to join the organization).

Once you are logged in hover your mouse over "More" which is located in the menu at the top of the screen, then click on "Treasury"
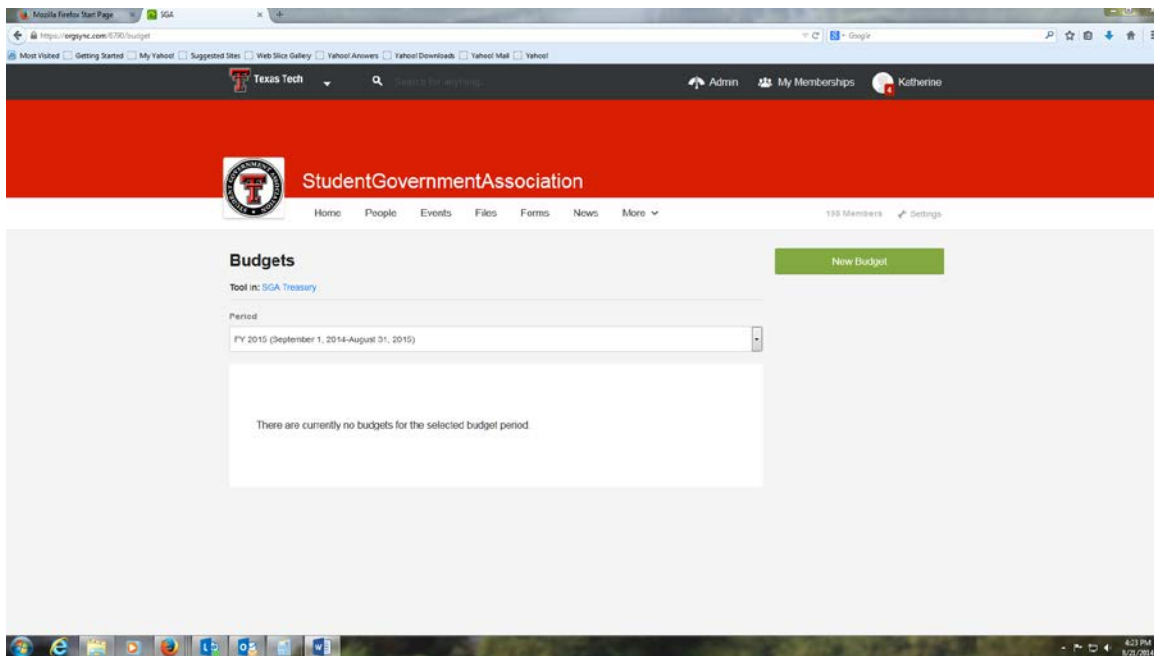
PLEASE NOTE: If you do not see "Treasury" when hovering over "More", you will need to utilize the set of instructions (on the SGA website and in SGA DOCS folder) to turn on that feature. Once the feature is active you can proceed to the next step on this handout.
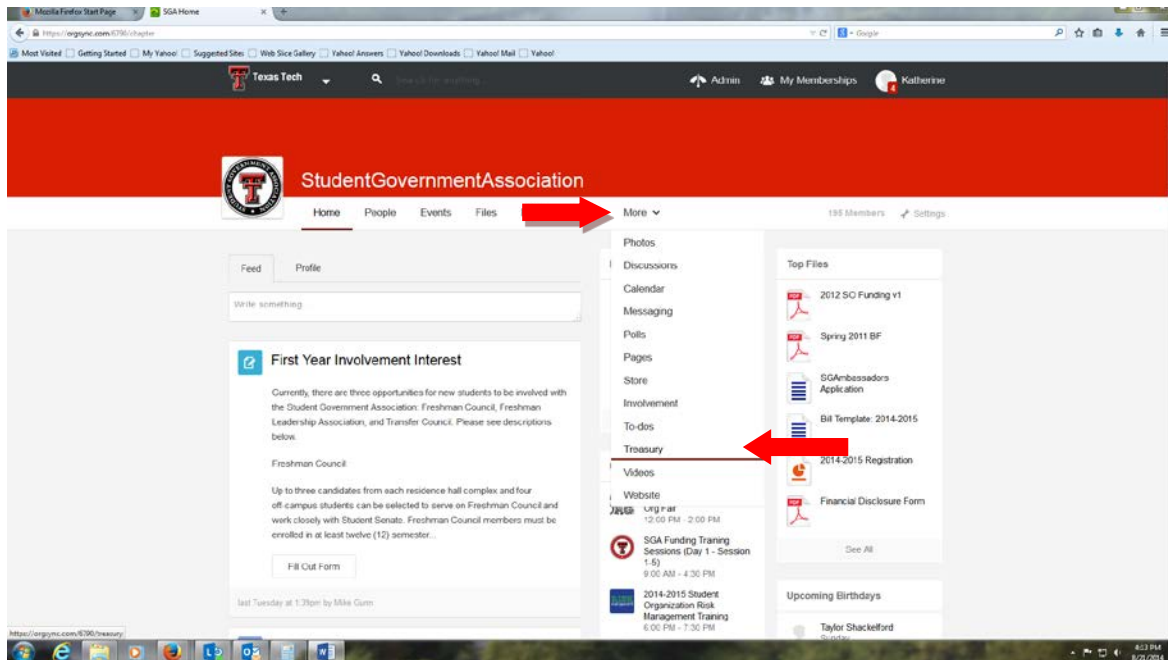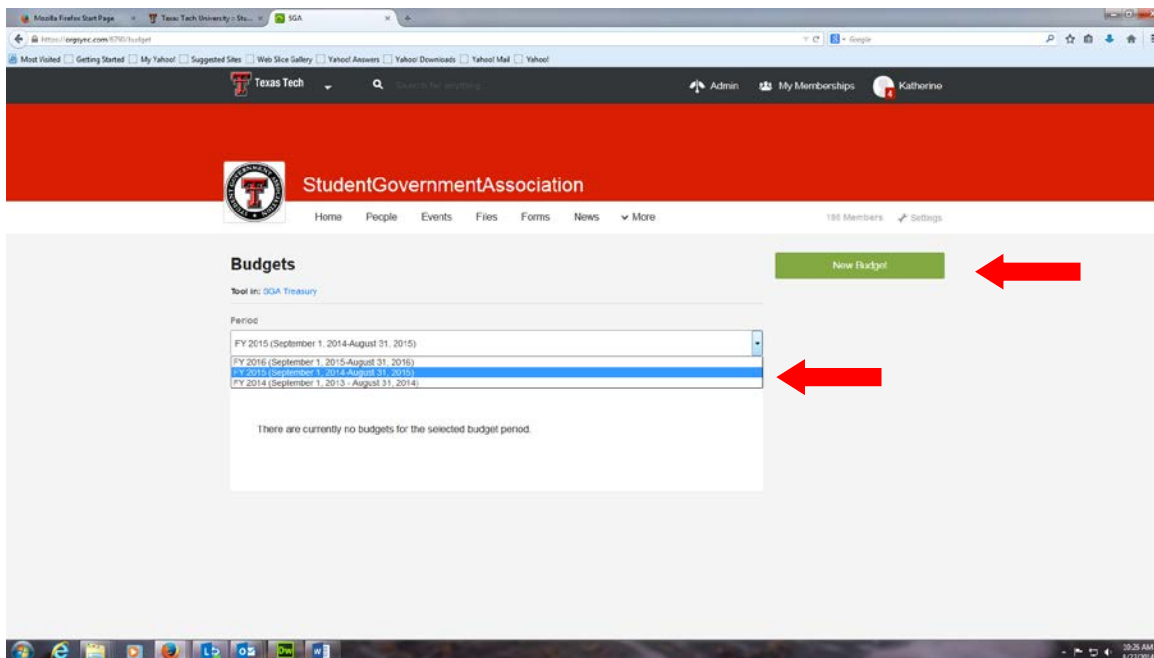

Your screen should look like the one below.
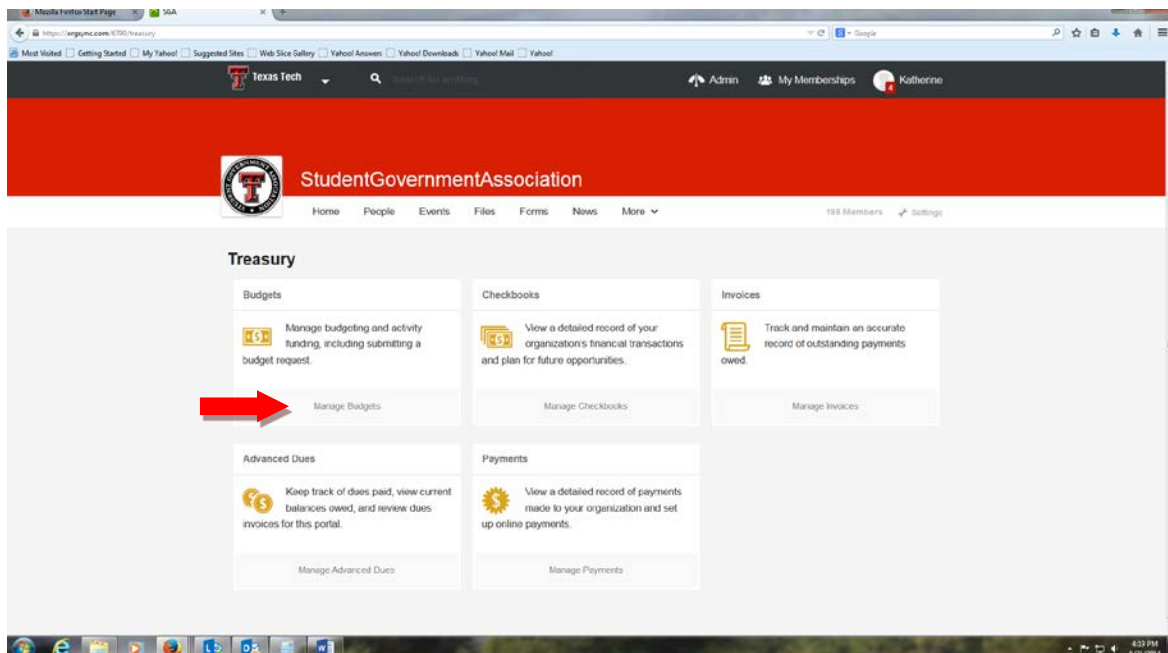
Click on "Manage Budgets" then your screen should look like the one below.

Make sure you select the current fiscal year from the drop down box in the "Period" field. (ex. FY 2015 runs September 2014 through August 2015) Then click the "New Budget" button.

Your screen should look like the one below. Make sure the Budget Period is the current fiscal year.

Give your budget a name (name of your organization).

Then choose the form you need from the Category drop down list (ex. General Reimbursement). See next page for a brief description of each form in the list. (NOTE: the "Budget Request for FY.." is only used from September to January when applying for funding for the upcoming fiscal year - during the annual funding request process).

Brief Form Descriptions within the Category Field

BUDGET REQUEST FORM – ONLY USED WHEN APPLYING FOR FUNDING FOR THE UPCOMING FISCAL YEAR NOT THE CURRENT FISCAL YEAR

CONTINGENCY FUNDING REQUEST FORM – USED FOR AN ORG NOT CURRENTLY FUNDED FOR THE FISCAL YEAR OR WHEN AN ORG HAS EXHAUSTED THEIR ALLOCATED AMOUNT AND HAS AN UNEXPECTED EXPENSE. ORG MAY APPLY FOR ADDITIONAL FUNDING (UP TO 25% OF ORIGINAL ALLOCATION)

GENERAL REIMBURSEMENT FORM – USED TO REIMBURSE THE ORGANIZATION FOR AN EXPENSE THE INCURRED…ORIGINAL RECEIPT(S) OR PAID INVOICE(S) MUST BE PROVIDED WITH THIS FORM AND/OR TURNED IN TO THE SGA OFFICE

GROUP TRAVEL APPLICATION FORM – USED WHEN THE ORG IS USING SGA ALLOCATION FOR A TRIP. MUST BE SUBMITTED 3 WEEKS PRIOR TO TRIP

GROUP TRAVEL RETURN FORM – THIS FORM IS SUBMITTED WITHIN 5 CALENDAR DAYS OF THE TRIP END DATE. ORIGINAL RECEIPTS HAVE TO BE TURNED IN TO THE SGA OFFICE

GUEST PROFESSIONAL FEES – USED WHEN PAYING PROFESSIONAL FEES TO A GUEST SPEAKER, AIRFARE AND/OR HOTEL FOR A GUEST SPEAKER, OR REIMBURSING THE SPEAKER FOR TRAVEL EXPENSES

      NOTE: AN ORGANIZATION, DEPARTMENT, OR ADVISOR CANNOT BE REIMBURSED FOR GUEST PROFESSIONAL FEES OR TRAVEL EXPENSES. SGA WILL ONLY PAY THE SPEAKER DIRECTLY OR PAY TRAVEL EXPENSES FOR THE SPEAKER

PURCHASE REQUEST FORM – USED TO PAY A VENDOR (COMPANY) DIRECTLY FOR SERVICES PROVIDED TO THE ORGANIZATION

REQUEST FOR EXPENSE APPROVAL – USED TO PRE-APPROVE LOGOS FOR RECRUITING/PROMOTIONAL ITEMS. ALSO USED FOR OTHER EXPENSES REQUIRING PRE-APPROVAL (REFER TO PAGE 12 OF THE FUNDING REGULATIONS HANDBOOK)

Fill out the form that pops up (see below). Make sure your pop up blocker is turned off. Make sure you fill in every field that is "required". Otherwise you will not be able to submit the form later. When you are done click the green "Done" button so the form will close.

Type in your organization's name in the "Name" field.

Select the type of expense you're requesting from the "Line Item" drop down box. Provide a description of the expense in the "description" field. Enter the amount you are requesting for the line item **from SGA** below "Request a Budget". If you have more than one item to claim on the form click "Add Line Item" and repeat this step.

If you did not fill out the form when it popped up you can click on "Fill Out" to fill out to complete that portion of the form.

If you are submitting either a General Reimbursement or Purchase Request form and need a Request For Expense Approval form to go with it click on "Add Budget Item". Select "Request for Expense Approval" from the category list and follow the same steps you completed earlier.

Fill out all the required fields then click "Done" Then click "Submit".

You will still need to turn in original receipts to the SGA office. You can simply print the form from OrgSync and attach receipts to turn them in.