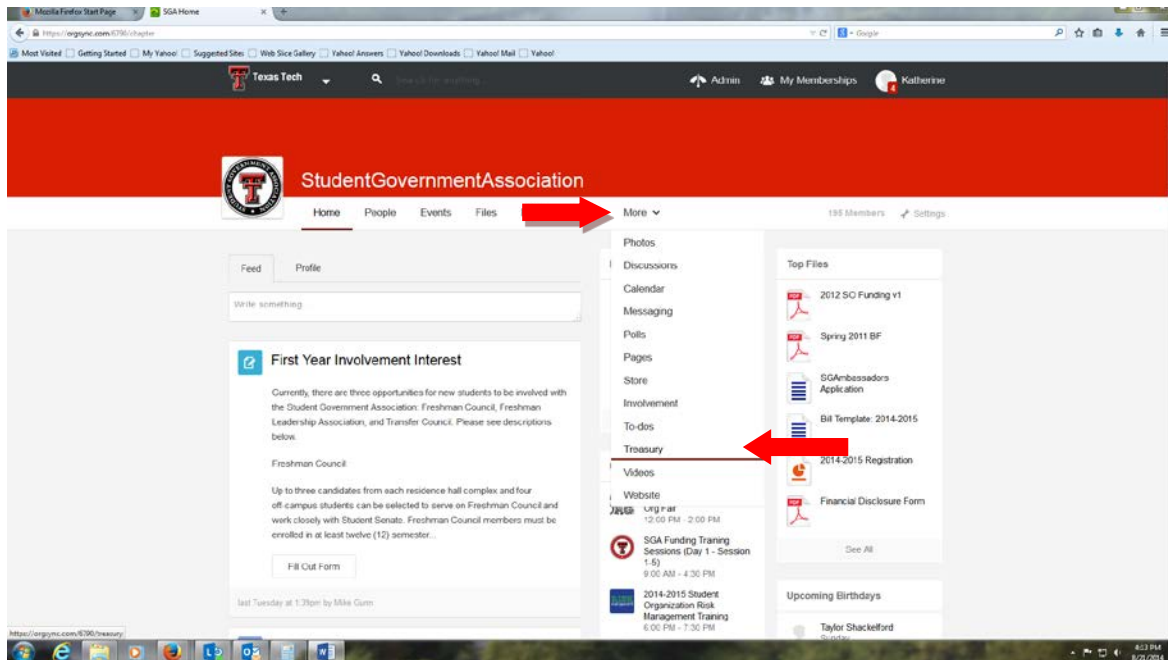


How to Submit SGA Funding Forms via OrgSync

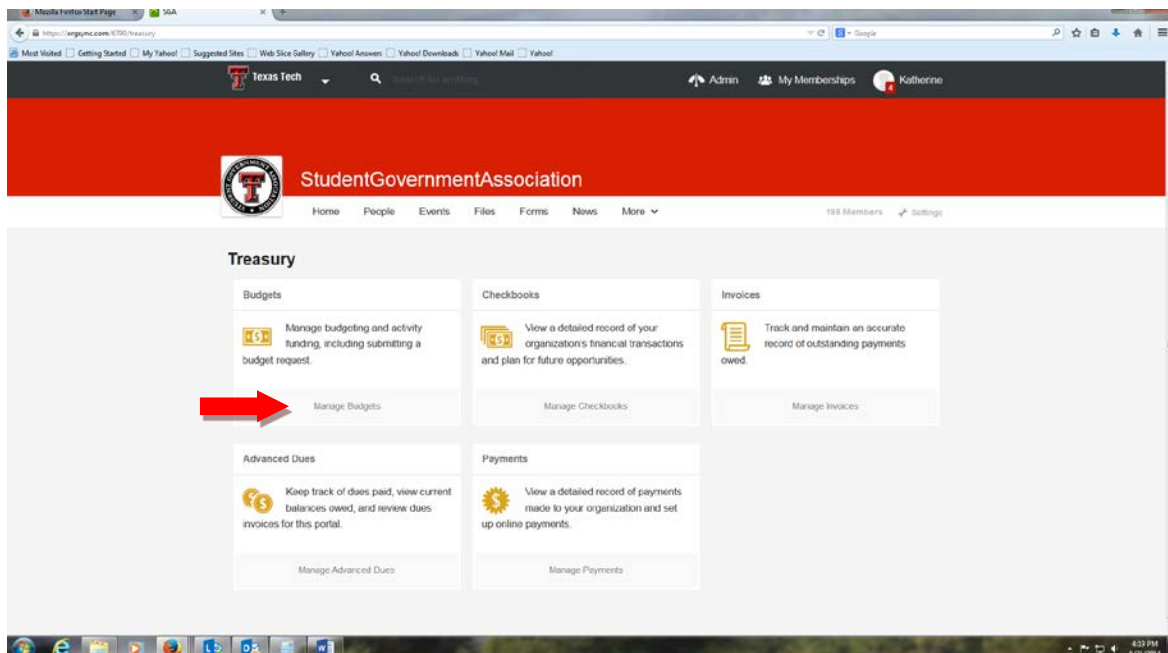
Log in to OrgSync with your ID/password (each member needs to create/setup their own profile then ask to join the organization).

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”

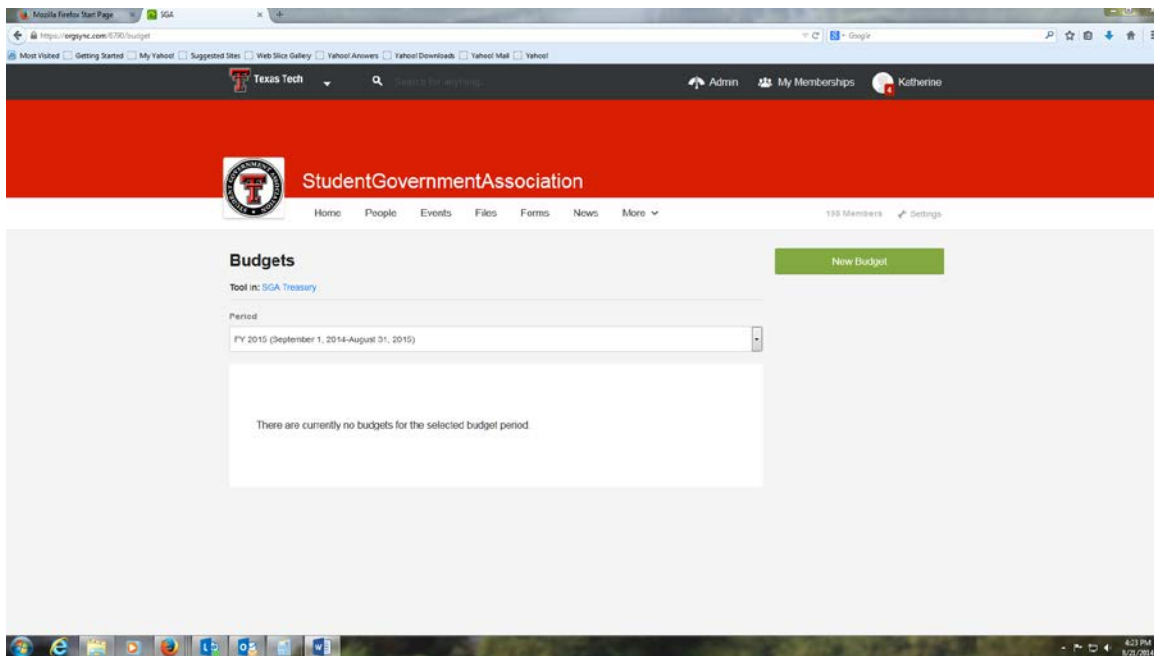
PLEASE NOTE: If you do not see “Treasury” when hovering over “More”, you will need to utilize the set of instructions (on the SGA website and in SGA DOCS folder) to turn on that feature. Once the feature is active you can proceed to the next step on this handout.



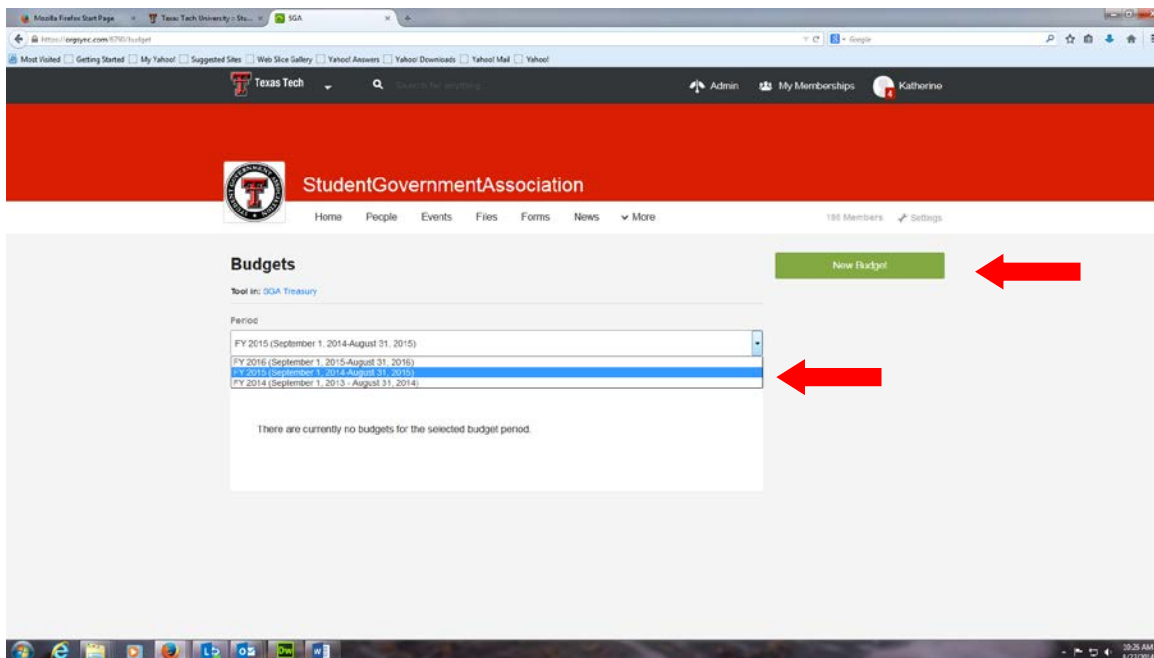
Your screen should look like the one below.



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.

The screenshot shows a web browser window with the URL https://sga.ttu.edu/budget/create_budget_request. The page title is "Create a New Budget Request". Below the title, there is a section titled "Instructions" which contains the following text:

An organization is eligible to receive SGA Supplemental Funding if it meets the following criteria:

1. Membership is open to TTU students and not restricted based on anything other than GPA, college and classification (i.e. race, gender, sexual orientation, physical or mental disability, national origin, or Vietnam era or special disabled veterans status).
2. Currently registered and in good standing with the Center for Campus Life by Friday, January 31, 2014.

Organizations NOT eligible for funding include, but are not limited to, the following:

1. Any organization not registered with the Center for Campus Life.
2. Any organization that can be, by virtue of its purpose, funded by Recreational Sports, including Club Sports/Teams, Intramural Sports, campus publications.
3. Organizations that significantly restrict membership, defined as an organization that uses criteria that are beyond the students' control to earn membership in the organization OR organizations that restrict membership based on anything other than GPA, college, and classification.
4. Organizations receiving funding directly from Student Service Fees.

For more information on the Funding Process please refer to the Funding Process Handbook located at (<http://www.depts.ttu.edu/sga/Funding/>...)

Below the instructions, there is a "Budget Name" text input field and a "Budget Period" dropdown menu. The "Budget Period" is currently set to "FY 2015 (September 1, 2014-August 31, 2015)".

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).

This screenshot shows the same "Create a New Budget Request" form, but with a red arrow pointing to the "Budget Name" text input field. Below the "Budget Name" field, there is a "Budget Period" dropdown menu set to "FY 2015 (September 1, 2014-August 31, 2015)". Below the "Budget Period" dropdown, there is a "Budget Details" section. This section contains a "BUDGET ITEM" table with a "Category" dropdown menu. A red arrow points to the "Category" dropdown menu, which is currently open and showing a list of options: "Budget Request for FY16 (September 2015 - August 2016)", "Contingency Funding Request", "General Reimbursement", "Group Travel Application (before traveling)", "Group Travel Return (turn in after the trip)", "Guest Professional Fees", "Purchase Request", and "Request for Expense Approval". The "General Reimbursement" option is highlighted. To the right of the "Category" dropdown, there is a "Name:" text input field and a "Request a total" button. Below the "Category" dropdown, there is a "Total for Budget Fund:" field showing "\$ 0.00".

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.

General Reimbursement - General Reimbursement Form

For more info: (http://www.dpt)

Name of Organization **REQUIRED**

Mail Stop **REQUIRED**

Budget Period

FY 2015 (September)

Date **REQUIRED**

Name of Adviser **REQUIRED**

Department **REQUIRED**

Done

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.

Request a Budget

Budget Name

Budget Period

FY 2015 (September)

Budget Details

Category: General Reimbursement

Line Item: Academic/Student Page

Description: Academic/Student Page

Amount: \$1.00

Add Line Item

Total for Budget Fund: \$1.00

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.

The screenshot shows a web browser window displaying the OrgSync 'create_budget_request' form. The form is titled 'Budget Request' and includes fields for 'Budget Name', 'Budget Period' (set to FY 2015 September 1, 2014-August 31, 2015), and 'Budget Details'. Under 'Budget Details', there is a table with columns for 'Category', 'Amount', and 'Description'. A red arrow points to the 'Add Budget Item' button. Below the table, there is a 'PS Out' section with a message 'This budget category has an attached form.' and a 'No amount' field. Another red arrow points to the 'Submit' button at the bottom of the form. The form also includes an 'Upload Documents' section and an 'Any Additional Comments?' field.

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.