# USING FINANCE

The Activities Funding Board (AFB) serves as a funding resource for all registered student organizations (RSO) at the University of Houston. RSO Officers can now apply for AFB funding right from their organization's Get Involved page. In a few simple steps, apply for funding and get up to date information on the status of your funding request and reimbursements/payments from the Activities Funding Board!

This manual will aid in navigating the process of accessing the module, applying for funding, and submitting your receipts or invoices for reimbursement, direct processing, or proof of purchase.

Section 1: How to Access the Finance Module

1. Go to your organization's home page and select **Manage Organization** in the right corner.
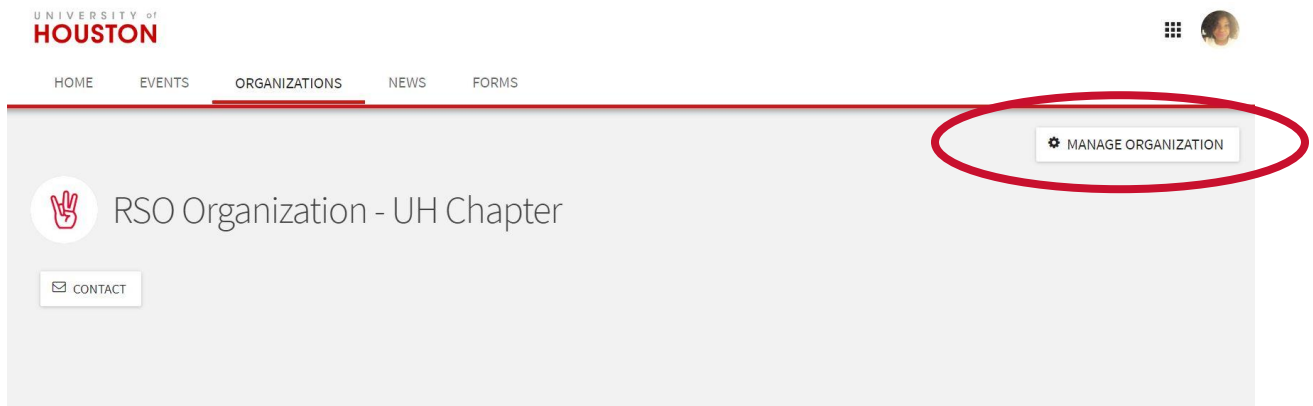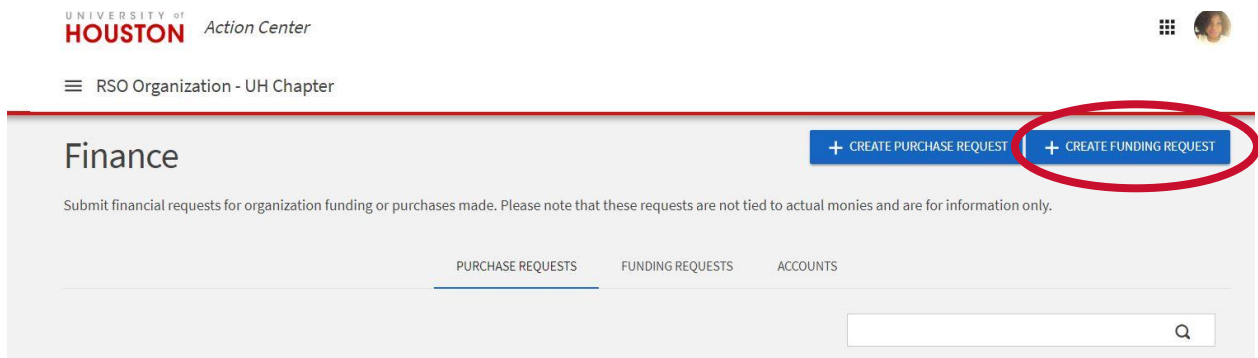
2. Click the toolbar on the left, then select **Finance.**
   a. **Note**: You must be a top three officer to complete the Finance application.
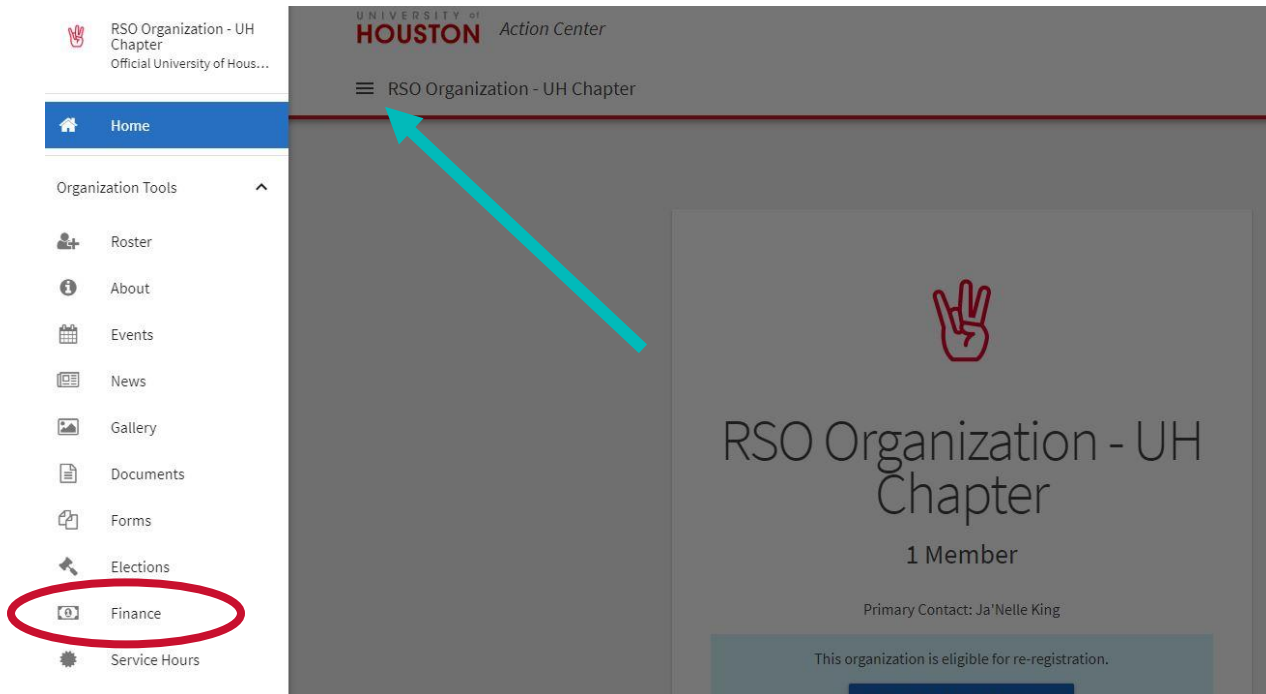
Section 2: Creating a Funding Request

1. Click the "**+Create Funding Request"** button.

2. Once you have opened the Funding Request, complete all relevant and/or required fields. Please be sure to provide a detailed description of the event/conference you are requesting funding for.

≡ RSO Organization - UH Chapter

Create Funding Request

*Fields with an asterisk * are required.*

Request Details

*Subject
Welcome Back Event Funding

*Requested Amount
500

Description
This event is for our organization to host a welcome back to school event for all students at the University of Houston to enjoy! We plan to have music, food, activities, and lots of opportunities for students to get connected!

*Account
[SELECT...]

*Categories
---- Select Category ---- ▼

Select Account   ✕

[🔍]

	Name	Parent	Balance	Available	Organization
SELECT	Testing Organization	Activities Funding Board	$0.00	$0.00	RSO Organization - UH Chapter

Showing 1 - 1 of 1

[CANCEL]

---- Select Category ----
Conference
Program

---- Select Category ---- ▼

3. Select your organization's account that is linked to the Activities Funding Board as the "**Parent**", and select either Conference, Program, or Frontier Fiesta as the Category for which you are applying for funding.
Note: Frontier Fiesta requests will only be reviewed in the Spring during the Fiesta allocation period.

4. Select the type of funding you are applying for: Reimbursement, Direct Pay, or Advance Pay. You can select more than one type of funding per event.
Note: Reimbursement and Direct Pay Requests must be submitted at least four (4) weeks before your event, Advance Pay Requests must be submitted at least six (6) weeks before your event.

* What type of funding are you applying for?
☐ Reimbursement
☐ Direct Pay
☐ Advance Pay

5. Complete the details of your event including name, date, location, and contact information. You will also need to notate if your event requires event registration, if you have a current and up to date Vendor ID and provide a copy of your approved organization memorandum.
   Note: Vendor ID paperwork is available within the application for you to complete if you do not have an ID or your current ID is inactive.

6. To identify what you would like to receive funding for, complete the Categories section by checking the necessary boxes.

*
Categories (Place the total amount for each category in the space provided):

☐ Advertising ($300 maximum request):

☑ Equipment/Facility Rental:
150 - advance pay
☑ Performance Fee:
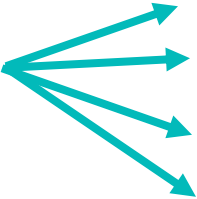50 - reimbursement
☑ Supplies:
50 - reimbursement
☑ Food ($500 maximum request):
250 - direct pay
☐ Transportation:

☐ Registration:

☐ Other Costs:

7. Enter the amount you'd like to receive in each area, with a notation of if it will be in reimbursement, advance pay, or direct pay if you have chosen more than one method and notate the hearing you'd prefer to attend.
   Note: The hearing date you select is not guaranteed. You will receive an email with a confirmation of the hearing you have been assigned. AFB will take into consideration the date and time you requested.

8. Lastly, you will need to confirm that you are one of the top three officers authorized to apply for AFB funding.

* Required
☑ I confirm that I am one of my organizations top three officers as listed on the memorandum.

9. Once you have completed the funding request you will be directed back to the Finance page where you will see a message as follows:

The funding request has been created and is awaiting approval.

10. Your funding request is now in queue and will be reviewed by the Activities Funding Board.

Section 3: Receiving Updates About Your Request

1. All changes regarding your funding request can be viewed within the request itself in Get Involved. By opening the request after it's been submitted you can view the stage history. This includes approval for a hearing, approval for funding, and comments associated with each stage.

Stage History

Date	Stage	Comment	Changed By
8/8/2018	Request Submitted		JaNelle King
8/8/2018	Approved to Attend Hearing	Invitation email sent 8/8.	JaNelle King

2. Once your organization has been approved for funding, you will receive an email.

N noreply@engage.mail.campuslabs.com ○ jsking8@uh.edu
Your funding request for Welcome Back Event Funding has been Completed
ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Your Funding Request for Welcome Back Event Funding was Completed by Ja'Nelle King

View Funding Request

3. You can also check the approval by clicking on the completed request itself.

Finance

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   FUNDING REQUESTS   ACCOUNTS

Subject	Approved Amount	Date Approved	Status	Stage	Action
Welcome Back Event Funding	$500.00	8/8/2018 10:10:42 PM	Completed	Organization Approved for Fund...	👁 🖨

← BACK TO FUNDING REQUESTS

✏ CHANGE STAGE

Funding Request: *000021*

Organization:	RSO Organization - UH Chapter
Contact:	JaNelle King
Subject:	Welcome Back Event Funding
Account:	Testing Organization
Category:	Program
Description:	This event is for our organization to host a welcome back to school event for all students at the University of Houston to enjoy! We plan to have music, food, activities, and lots of opportunities for students to get connected!

Request No:	000021
Status:	Completed
Requested Amount:	$500.00

✔
Approved Amount:	$500.00
Approved On:	8/8/2018 10:10:42 PM
Approved By:	JaNelle King

4. You can see the allocation you have received by clicking on Accounts, then the Organization's Name.
   Note: The money listed in your account is not real, but an aid to show how much you have been allocated. You will still need to submit receipts through a Purchase Request (instruction in Section 4) to receive your reimbursement or have your invoices paid.

Finance

+ CREATE PURCHASE REQUEST   + CREATE FUNDING 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   FUNDING REQUEST   ACCOUNTS

Name	Description	Parent	Balance	Available
Testing Organization		Activities Funding Board	$500.00	$500.00

Account Details
Testing Organization

Description	
Parent Account	Activities Funding Board
Organization	RSO Organization - UH Chapter
External Account ID	

$500.00
BALANCE

$0.00
ENCUMBERED FUNDS

$500.00
AVAILABLE FUNDS

REQUESTS   TRANSACTIONS
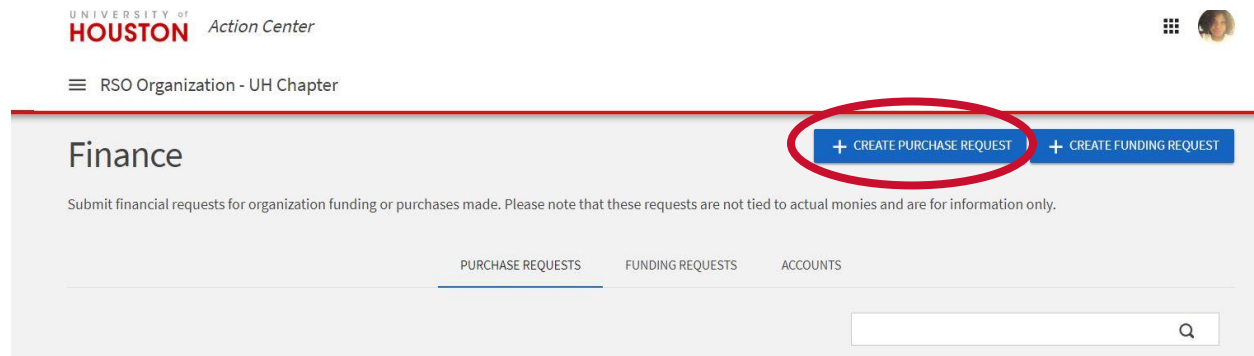
Subject	Amount	Approved Amount	Date Approved	Status	Action
Welcome Back Event Funding	$500.00	$500.00	8/8/2018 10:10:42 PM	Completed	👁 🖨

5. Plan your event and save those receipts!

Section 4: Creating a Purchase Request

To submit receipts to receive your reimbursement, provide invoices for direct payment, or provide proof of purchase for an advance payment, organizations will need to complete a Purchase Request. This will allow the Activities Funding Board to review your receipts and keep your organization up to date on where you are in the payment or reimbursement process.

1. Click "**+Create Purchase Request**" button.

2. Once you have opened the Purchase Request, complete all relevant and/or required fields.

3. Select your organization's account that is linked to the Activities Funding Board as the "**Parent**", and select either Conference, Program, or Frontier Fiesta as the Category for which you applied for funding.

Create Purchase Request

Request Details

*Subject
Welcome Back Event Reimbursement

*Requested Amount
500

*Description
Requesting reimbursement for expenses, direct pay, and providing documentation for advance pay we received.

*Account
SELECT...

*Categories
---- Select Category ----   ▼

Select Account

	Name	Parent	Balance	Available	Organization
SELECT	Testing Organization	Activities Funding Board	$500.00	$500.00	RSO Organization - UH Chapter

Showing 1 - 1 of 1

CANCEL

---- Select Category ----
Conference
Program

---- Select Category ----   ▼

4. You will need to list your organization as the Payee and provide the address that matches your bank account, W9, and direct deposit information.

Payee Information

First Name
RSO Organization - UH Chapter

Last Name

Street
4465 University Drive, N103

Street Continued (Optional)

City
Houston

State/Province   ZIP/Postal Code
TX   77204

5. Enter the details of your event including name, date, number of attendees, and how your event was impacted by AFB funding. You are also required to submit photos of the event, a PDF of your receipts, one PDF of any invoices for Direct Pay, and/or the Reconciliation Form if you received Advance Pay.

* Please upload a photo of your organization's event!

UPLOAD FILE

* Please upload one file containing all the itemized receipts associated with AFB funding for your organizations' event.

UPLOAD FILE

If you utilized Direct Pay, please upload all associated invoices here.

UPLOAD FILE

Please upload the reconciliation form if you received Advance Pay.

UPLOAD FILE

6. Once you have completed the purchase request you will be directed back to the Finance page where you will see a message as follows:

The purchase request has been created and is awaiting approval.

7. When your purchase request has been approved, you will receive an email message from Get Involved. Please note, if there is a discrepancy between the receipts submitted and the amount that will be reimbursed, the Activities Funding Board will make note within the approval.

N   noreply@engage.mail.campuslabs.com   jsking8@uh.edu
     Your purchase request for test has been Approved
   If there are problems with how this message is displayed, click here to view it in a web browser.

Your Purchase Request for test was Approved by Ja'Nelle King

View Purchase Request

8. You can review the status of your purchase request by opening your organization's Purchase Requests and viewing the status and stage.

9. You can view additional comments by clicking the "eye" next to your event and reviewing the request approval and Stage History at the bottom.

10. Once AFB submits paperwork for your organization to receive the direct deposit, they will update the stage to "Expenditure Sent". AFB will follow up with your organization within 10 business days to ensure you received your funding.

   Any unused funds that were allocated will be returned by System Administrators to the Activities Funding Board account.

   If you have not received your funding after 10 business days from the date of the "Expenditure Sent" please contact AFB at afb@uh.edu.