HPCC
Budget Meeting
Who Are We???

-Umbrella Organization
-Appointed by SG Finance
-Manage Budget of Sub-Orgs
-First phase of the SAR, TAR, & Special Requests Approval Process.
-Assist Sub-Orgs with any financial concerns or questions
-Make sure all information is submitted into Docutraq correctly
-Approve/Deny Docutraq submissions based in inadequate funds, guideline violations, and/or incorrect information submitted to Docutraq.
Goals/Expectations

• **Our Goal this Fall:** To increase interaction between student organizations in the college.

• **Expectations:**
  - Cooperation from you guys
  * Open communication
  * Adhere to the guidelines set by SG finance
  - Support our goal
Programs
Involvement Showcase

• Date: TBA.
  • Sometime at the end of September or the very beginning October

• What:
  • Tabling event where organizations under the HPCC umbrella showcase what their organization is about and how students can get involved.

• Where:
  • Space under the auditorium
Luncheon.

- **When:** TBA
  - End of October or very early November
- **What:**
  - Event were students get to interact with professors, TAs, and Graduate students from our college to facilitate communication and connections
- **Where:**
  - Space under auditorium
What we need from you!

- PUB!
  - Invite your constituents
    - Email list serves, reminders at general body meetings
  - Bring yourself, and your e-board
  - Participate!
    - Especially for the involvement showcase
Important Guidelines
Important Guidelines

#1. Do not spend ANY money until it gets approved (unless its OSRV).

#2. Any SAR must be submitted at least 10 business days (2 weeks) before goods/services are needed.

#3. Any TAR must be submitted at least 10 business days before travel date.
Important Guidelines Cont...

#4. Paying for services: Submit all SAR’s associated with event at least 30 days prior to event date.

#5. If you need to be reimbursed, turn in all itemized receipts in to SG Finance within 30 business days of date of purchase.

#6. You may not use SG Finance funds to gain OSRV. (ex. A&S fees cannot be used to host an event that will raise more money for your org. ➔ t-shirts or car wash materials)
#7. When filling out SAR/TAR, input appropriate Project Ex. Do not put down Advertising Project # (06) if the funds being requested will be used for Program/Events (02).

#8. Do not use SG Funds to purchase alcohol

#9. SG Funded organizations may not charge Membership Dues or charge any UF student to attend an event.
Docutraq
Instructions & Reimbursements
SAR: Student Activity Request

- the form you need to initiate the use of SG funds for the purchase of any goods, service, or travel in relation to your organization
- the expenses you create an SAR for must already be in your budget
How to do an SAR

- Must be done through Docutraq: [www.docutraq.sg.ufl.edu](http://www.docutraq.sg.ufl.edu)
- In your Dashboard, click “create new SAR”
- Select the type of SAR
- Click “get started”
- Confirm the type of SAR
- Enter contact info (be careful about budgeted project number!)
How to do an SAR continued

• Enter vendor info (be careful about UFID)
  • Vendor is whoever is being reimbursed or where goods/services are coming from
• Click “add item”
• Select a budget line
• Fill out item info
• Add any additional items
• Click “next”
How to do an SAR continued

- Review all your entered information
- Click “submit”
- Verification page should appear
- Your done! View your SAR as a pdf, either save or print for your records
TAR: Travel Activity Request

• the form needed to initiate the use of SG funding to cover travel done by members of your organization
• the trip must already be in your organization’s budget
• all travel is a reimbursement!!
How to do a TAR

• Follow the same steps as for an SAR except when selecting the type of SAR choose “Travel”
• Also, when selecting a budget line, you can only use either line 10 or line 13
• The rest is the same!
Travel Rules

- Only 50% will be funded
- Up to $350 per person per trip MAX
- Up to 4 people can be funded this way
Reimbursements

- Before you are able to be reimbursed, you must submit an SAR and be approved to spend that money
- When you make a purchase, make sure to get an itemized receipt
- Bring all the receipts associated with an event or SAR to the SG finance office within 30 days of the purchase
Reimbursements continued

• The person to bring the receipts to SG finance must be the person who made the purchase(s)
• Remember to bring in all receipts for an event/SAR together, all at once
Contracts

- A contract SAR is required to be submitted at least 30 days (1 month) before the event.
- This is needed anytime you are paying someone to be at your event. Ex: DJs, Speakers, Bands, etc.
- If you are having someone (a speaker, band, or DJ, etc.) attend one of your events but are not paying them, you still need a contract; this is called a Memorandum (Contact SAI...).
Line Item Transfers

- Your organization is able to move up to $1,500 per semester from one line to another.
- The form needed to do this is available at the SG finance office.
- Money cannot be moved from copies!
- Money cannot be transferred into programs, food, or OSRV.
Outside Revenue

- If you receive a check, it must be made out to UF and you must bring it to the SG finance office within 15 days to be added to your account
- *You cannot use any kind of SG funding for an event that is being used to gain outside revenue*
Limits

- Food: Cannot charge more than $3.00 per person for an event involving food, must be served buffet style.
- Promotional Items: up to $1.50 only and they must include SG Finance logo.
Contact Info

• Savannah Ray-Treasurer
  -Email: savannahmray@ufl.edu

• Joshua Cooper-President
  -Email: joshuajcooper@ufl.edu

• Nehizena Aihie (Nehi)-Vice President
  • -Email: naihie@ufl.edu