Funding

• We are a state funded university which means there are statutes with restrictions for the usage of our budgets

• M.D. Program Student Organization funding is allocated to the M.D. Student Council by the main campus SGA through the Activity and Service Fee Budget (A&SF). Often referred to as SGA funding or dollars
  • This budget is managed by main campus SGA. COM receives an allocation from this budget due to our closed interest groups
  • Record keeping is important to prove justification and need for COM organizations
  • Budgets spent on items beyond food are more highly regarded and help with our justifications and continued funding
Do’s of Student Org Funding

- Must submit the current year’s PRF form
- Do order from commonly used vendors
  - Do inquire about possible discounts
- Do obtain and submit final receipts for orders
- Do let Student Services know if an event is cancelled (especially with a food order!)
- Do host joint meetings or events to save on costs
- Complete the Financial Training available for all students interested
  - [https://asf.sdes.ucf.edu/training/](https://asf.sdes.ucf.edu/training/)
Don’ts of Student Org Funding

- Don’t purchase gift cards, cash equivalents, or raffle items (not allowed with SGA dollars)
- Don’t change your meeting date without changing your food order (if PRF already submitted)
- Don’t sign contracts with vendors for goods or services
- Don’t charge admission or registration fees to students for student events funded by A&SF dollars
  - May be open for suggested donations
- Don’t host homemade bake sales (COVID times or otherwise)
- Don’t hold raffles or lotteries
- Don’t pay for anything with your own money (you CANNOT be reimbursed from this funding)
- Don’t use for membership dues
- Don’t use for donations or for items bought for donation
What can Student Org budgets be used for?

- Items/supplies
- Promotional items for your organization
- Printing Services through the UCF Print Shop
- Most services – if you are unsure please email us
- Decorations for applicable events
- Licensing to show films *(incredibly rare but possible if needed)*
- Food items
  - Food for meetings or events when timing does not allow for students to bring their own lunch
  - Snacks for events
What can Student Org budgets be used for?

- Speaker funding
  - Referred to as an Honorarium
  - May cover travel, hotel and meal expenses
  - The only kind of PRF that is a reimbursement
  - Will be in the form of a check or wire transfer to your speaker after the date of the event
    - Can take up to 4-6 weeks to receive
  - Must submit a PRF that only indicates Speaker fee – do not break down what the fees are for
  - Provide a lump sum invoice for the total amount
  - Cannot provide speaker fees to UCF faculty or Staff
Everything you wanted to know about PRFs!

• PRF stands for Purchase Request Form
• A complete PRF packet includes 3 items:
  • PRF
  • Invoices
    • For online orders this would be a screenshot of your cart and word document with links AND quantities for each item to be ordered
    • For Publix orders this is the invoice given to you by the Apron’s Event Planners
    • For a food vendor this is a pre-receipt or order invoice which indicates the order is for a future date
  • Event/Meeting flyer
    • Must include the SGA logo, time, date, title, and location
    • Can be a basic word document for PRF purposes if the official flyer hasn’t been finalized yet

• For items purchased through a PRF, we cannot get you a reimbursement! Please don’t pay for anything out of pocket hoping to be reimbursed!
**Purchase Request Form (PRF)**

**New form this year!**  
Check the date and the new logo!

## Purchase Request Form  
**Fiscal Year 2020 - 2021**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Vendor Payment Options**  
- Credit Card   
- Check  
- Grand Total: $0.00

**Benefits to the Student Body - REQUIRED**

Only those individuals or positions on the ASB's Business Office's authorized signature list may sign below, and only those student organizations registered with the Office of Student Involvement that have received an ASB-approved allocation or bill may request funds for purchases. All purchase requests must be submitted at least 10 BUSINESS DAYS prior to the time that items and/or services are required. Please take into consideration required packaging/shipping times of the vendor. All purchase requests must follow all guidelines set forth by the Student Government Finance Code and the ASB's Business Office's Financial Training. **DO NOT** purchase any items and only instruct by the assigned Accounting Specialist as we do not offer reimbursement after the fact. All authorized signatures must have successfully completed the ASB's Business Office's Financial Training. By signing below, you are certifying that you understand these rules and will abide by them.

### Signature Block

<table>
<thead>
<tr>
<th>Name (First)</th>
<th>Date</th>
<th>2nd Authorized Name (Print)</th>
<th>Date</th>
<th>ASB/DU Accounting Specialist Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amy Morrison</td>
<td></td>
<td>Brandon Tapasak</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Record]**  
- P.O.  
- P.C.  
- P-Cardholder Name

**Revised 7/20 Previous Form Obsolete**
The Complete Packet
(A Visual Guide)

The PRF

The Invoice
Three examples below: Publix, Amazon and Papa Johns

The Flyer
Two examples of fliers: basic flyer with info and logo or the final flyer – either for the packet is fine!

DIAG presents
A Suture Clinic
Come practice your suturing skills with DIG and hear Dr. Greenwald discuss melanomas

When: July 29th at 12pm
Where: COM 104

ORIENTATION WEEK
"AS YOU ARRIVE..." by PANAMA ALASKA ADVERTISING AGENCY INC.
Most commonly used & approved vendors

For items/supplies *(Online vendors only!)*
- Staples.com
- Amazon (Prime only)
- Dollar Tree.com
- Oriental Trading.com
- Walmart.com
- Michaels.com

For Promotional Items/Print
- UCF Print Shop for all banners, brochures, zines *(Free delivery to COM!)*
- Custom Ink.com
- Makestickers.com
- Stickermule.com

For Food/Snacks
- Publix *(ONLY the Cornerstone @ Lake Hart store. Lake Nona Creekside does not have the Apron’s Event Planners which is necessary for billing)*
- Papa Johns, Domino’s Pizza Hut *(Ask for a discount!)*
  - Chick-Fil-A
- Giovanni’s Italian Restaurant *(the location closest to COM)*
- Dunkin Donuts

If you have any questions on if a vendor is approved please reach out to us.

Rule of thumb – if they can accept a VISA credit card payment over the phone, provide you an invoice up front, and do not require a deposit, we can make it work.
Do’s of PRFs

• When ordering food delivery or take out you **must** get the receipt and drop it off in the Student Affairs office
  • Please drop off no later than the Friday the week of your meeting
  • Repeated failure to provide receipts for orders will result in the revocation of food orders

• When ordering food for delivery make sure to give the student’s name who will be available to pick up/receive the order and the organization that it is for
  • COM has many people on campus! Delivery drivers & Welcome Desk staff don’t know everyone 😊

• Add tip to your order total and PRF!

• When submitting an PRF for items, do include the quantities of the items along with the links
Don’ts of PRFs

• Don’t use last year’s form
• Don’t try to edit the intentionally locked fields on the form
• Don’t submit an incomplete packet
• Don’t forget to add your event date
• Don’t sign them
• Don’t send them to main campus – send to the M2 Student Council Treasurer
• Don’t split payments – UCF does not pay deposits
Important things to note for PRF orders

• If ordering beverages from Publix, must be Coca-Cola products only. UCF has a sponsorship/agreement with the Coca-Cola company.
  • [https://www.coca-colacompany.com/brands](https://www.coca-colacompany.com/brands)
  • If you order a non-Coca-Cola item that Coke carries, Accounting will simply not pay for that item

• All food orders are paid day of the event/order over the phone with a credit card by our main campus accountant (they are not located at COM)
  • The earliest a food order may be paid for is the week of an event – at request

• For all items ordered, we will email you that your package has arrived. A student from the group must come to pick up your items from the Office
  • If your items require storage, may request the student organization closet badge to gain access to store your items until your event
Submit your PRFs EARLY! This process takes up to 15 days!

- The PRF process begins with the Treasurer preparing a complete PRF packet.
- The packet is submitted to the M2 Student Council Treasurer for review and approval.
- The PRF is then submitted to the Assistant Director of Student Services for review, approval, and final signature.
- The Assistant Director sends the PRF to the Business Office (main campus accounting) for processing & purchasing.

If supplies, the submitting student will receive an email that the items have arrived.

If food, orders will be paid for via phone day of the order by the accountant.

Please be mindful of your timing (especially during M2 exam and major event weeks).

A last minute request due to lack of planning on your part is not guaranteed.

Submit your PRFs EARLY! This process takes up to 15 days!
Funding

All of the previous information can be found on the Student Org webpage.
Banking and Finances

• Organizations may open a bank account if your group receives any form of income (i.e. membership dues, grants, scholarships)

• To set up an account a group member must register for an EIN (employee identification number) - www.irs.gov
  - Have policies put in place to update this number once you leave the leadership position or graduate. Failure to do so may result in personal banking issues for you after graduation (trust us it’s happened before)
  - We recommend uploading a copy of your EIN documents to your group’s files section on webcourses
  - For a detailed step-by-step please access the “How to Obtain an EIN for Student Orgs” document from Harvard in the M.D. Student Organization webcourse

• Must obtain a letter of support from the Student Services team (send requests to Casey Smith) to open an account and also to add or remove new/past members from the account

• Can open an account at any of the surrounding banks near COM – we recommend the Credit Union, Suntrust or PNC

• For spending your group should have policies in place to prevent unauthorized spending or misuse of group money (i.e. requiring two signatures on transactions) and detailed records kept of how money is spent
  - Must be ready to provide documentation at any time
Banking and Finances - Taxes

• M.D. Student Organizations are not automatically tax exempt
• Many local or national affiliations have federal tax-exempt or 501©(3) exemption
  • If you’re a chapter of a national organization check with them to see if your group is covered under the parent organization’s tax-exempt status
• M.D. Student Organizations cannot use UCF’s tax exemption to purchase goods or food without state sales tax
  • This excludes purchases made via a PRF
New for 2020 – Fundraising, Supplemental Funding for National Chapters Dues

• The Office of Student Affairs and the Office of Development & Alumni Engagement have partnered in an effort to address the needs for additional or alternate funding beyond the established options. This has two components:

• We are first happy to announce a legitimate process for hosting fundraisers for M.D. Student Organizations
  • Any fundraising ventures must be approved via the new process
  • Organizations may not solicit funds in any capacity without the approval of the Office of Development
  • Student Affairs cannot send out any emails soliciting funding on your behalf
  • For more information visit the Student Org & Events page under the Fundraising section

• Also happy to announce a new source of funding to help offset the costs of fees association with national organization memberships. This funding is supported by the M.D. Parent and Family Council fund (for Student Activities)
  • This funding WILL be via reimbursement (opposite of SGA dollars through PRFs)
  • Organizations seeking to obtain national chapter status will be able to submit a request for reimbursement for application and/or registration fees associated with applying for a national charter
  • At this time individual student membership or annual chapter dues cannot be covered via this process. However, COM organizations are permitted to collect membership dues for this purpose