

Funding

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/>

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

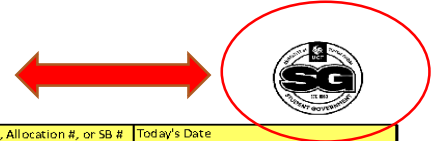
Everything you wanted to know about PRFs!

- 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)



Purchase Request Form
Fiscal Year 2020 - 2021



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

Organization Name Medical School Programming		Budget Line, Allocation #, or SB # 71100007 - 85	Today's Date	
Initiator's Name (Print) Bianca Anderson		Phone 61357	Advisor's Name (Print) Casey Smith	
Email Address casey.smith@ucf.edu		Advisor's Signature		Event Date (if applicable)
Recommended Vendor		Contact		(A&SF Business Office Use Only)
Address		Phone		
City		State		
Email		Zip		
Item #	Description - Attach all quotes and/or documentation	Quantity	Unit Price	Total
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
Vendor Payment Options			Credit Card <input type="checkbox"/>	Check <input type="checkbox"/>
			Grand Total	
			\$ 0.00	
Justification or Use of Item(s) - REQUIRED				
Benefits to the Student Body - REQUIRED				
<p>Only those individuals or positions on the A&SF 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 SG-approved allocation or bill may request funds for purchases. All purchase requests must be submitted at least TEN (10) BUSINESS DAYS prior to the time that items and/or services are required. Please take into consideration required production/shipping times of the vendor. All purchase requests must follow all guidelines set forth by the Student Government Finance Code and the A&SF Business Office's Financial Training. DO NOT purchase any item(s) unless instructed by the assigned Accounting Specialist as we do not offer reimbursements after-the-fact. All authorized signatories must have successfully completed the A&SF Business Office's Financial Training. By signing below, you are certifying that you understand these rules and will abide</p>				
by them: IDT BY Other <input type="checkbox"/> ASF <input type="checkbox"/> Dept Name _____ Dept # _____ Acct # _____ P.O. <input type="checkbox"/> P-card <input type="checkbox"/> P-Cardholder Name _____				
Name (Print) Amy Morrison		Date	2 nd Authorized Name (Print) Brandon Tapasak	
Authorized Signature		Date	2 nd Authorized Signature	
ASFBO Accounting Specialist Signature			Date	ASFBO Approver
			Requisition #	Initials Date

Revised 7/20 Previous Form Obsolete



The Complete Packet

(A Visual Guide)

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The PRF

Activity and Service Fee Business Office | **Purchase Request Form** | Fiscal Year 2020 - 2021

Organization Name: **Medical School Programming** | Budget Line Allocation #, or SA #: **71100007 - 85** | Today's Date: _____

Requestor's Name (Print): **Bianca Anderson** | Phone: **61357** | Advisor's Name (Print): **Casey Smith** | Event Date (if applicable): _____

Requestor's Address: **casey.smith@ucf.edu** | Advisor's Signature: _____ | Institution (if applicable): **UCF COM**

Recommended Vendor: _____ | Contact: _____ | Phone: _____ | (ASFS Business Office Use Only)

Item #	Description - Attach all quotes and/or documentation	Quantity	Unit Price	Total
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
				\$ 0.00
Vendor Payment Options				Grand Total
<input type="checkbox"/> Credit Card	<input type="checkbox"/> Check			\$ 0.00

Authorized Signatures: **Amy Morrison** (Requestor) | **Brandon Tapasak** (Advisor)

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The Invoice

Three examples below: Publix, Amazon and Papa Johns

Publix Customer Invoice

Customer ID: **2696** | Customer Name: **Chelsey McKinnon UCFC** | Company: **UCF College of Medicine**

Quote	EventID	Event Name	Event Date	Event Time	Pickup Date	Pickup Time
<input type="checkbox"/>	5239	Club Meeting	9/11/2018	11:00		

Quantity	Item Description	Price
1	PBX WRAP VARIETY L	\$0.99



1	POPCORN CHEK PLT M	\$36.96
1	PUB LEMLEME SODA	\$0.96
2	PUB COLA	\$0.96
1	PUB DET COLA	\$0.96
1	PUB ORANGE SODA	\$0.96
1	PUB PRINT MUPIN	\$2.15
1	PUB 8 1/2" PR LITE	\$2.99
1	TRANSFONT 16 OZ CLP	\$2.79

Estimated Total: _____
 Estimated Service Fee: _____
 Deposit: _____
 Estimated Balance Due: _____

Event Planner: **Loria**
 Date Event Planned: **8/19/2018**
 *Prices may vary slightly from this quote. Estimated Balance Due date: **Monday, August 19, 2018**

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The Flyer

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

DIG presents
A Suture Clinic
 Come practice your suture skills with DIG and hear Dr. Greenwald discuss melanomas
 When: July 29th at 12pm
 Where: COM 104

ORIENTATION WEEK

AT THE UNIVERSITY OF CENTRAL FLORIDA COLLEGE OF MEDICINE

EVENTS

- SUNDAY 8/4**
4:00 p.m. - closing Little Name Road Park Soccer
- MONDAY 8/5**
3:00-4:00 p.m. COM Parent Reception in Atrium (M1)
- WEDNESDAY 8/7**
5:30-7:30 p.m. Ariel Apartments Pool Party @ Ariel Apartments
- THURSDAY 8/8**
6:15-8:00 p.m. Big Little Mixer @ COM Atrium
- FRIDAY 8/9**
10:00-2:00 a.m. Buses to Downtown leaving Landon House at 10 p.m. and returning 2 a.m.
- SATURDAY 8/10**
12:00 evening MCO Annual Food Purrty @ Dr. Carr's Lake House

PLEASE FOLLOW FACEBOOK PAGE FOR CHANGES AND UPDATES

Shopping Cart

Item	Price	Quantity
First Aid Book: USMLE Step 1 2018, 28th Edition by Ta Paperback Only 8 left in stock - order soon. Shipped from: Vault of Books Gift options not available. Learn more	\$36.11	1
Mars Chocolate Favorites Fun Size Candy Bars Variety Mix 3.9 Ounces (60-Piece Bag) Ideally enjoyed within 3 to 6 days of opening. Prime member exclusive <input type="checkbox"/> This is a gift. Learn more	\$10.49	1

Subtotal (2 items): \$46.60



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

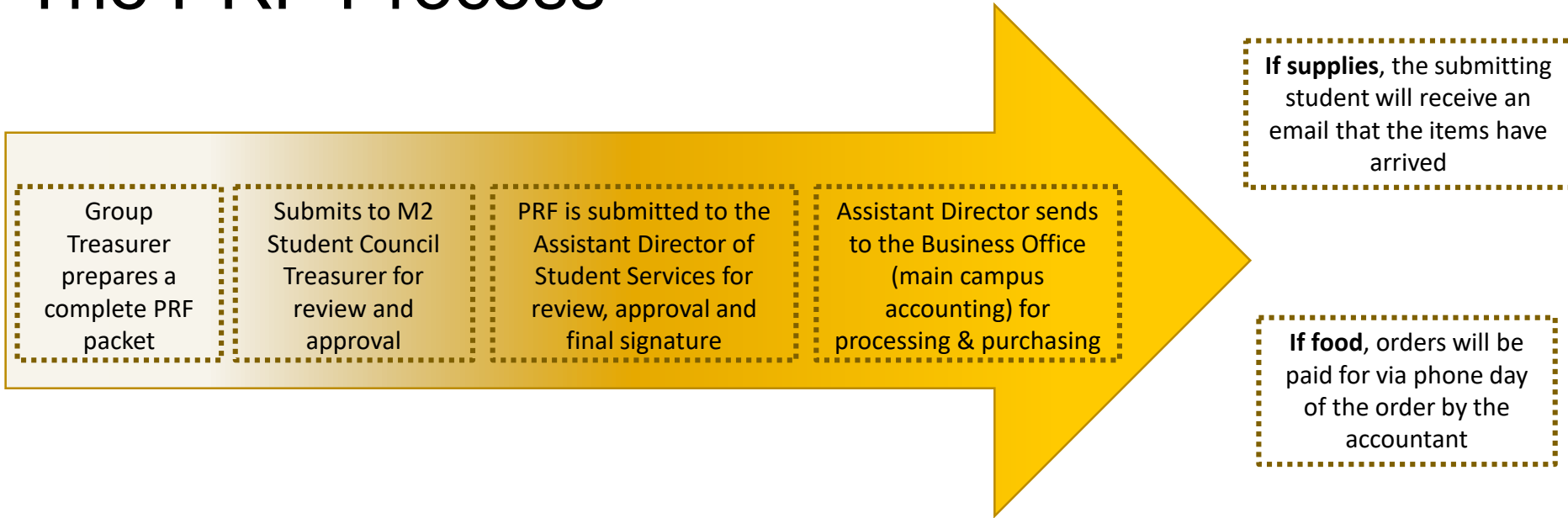
Don'ts of PRFs

- 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>
 - 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

The PRF Process



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

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

Funding



All of the previous information can be found on the Student Org webpage

- Exposure to Infectious Diseases and Environmental Hazards (Bloodborne Pathogens)
- Enrollment Requirements
- Extracurricular Activities
- How to Research Residency Programs
- Student Mistreatment
- Student Health Services
- Registrar
- Academic Calendars
- Liability/Malpractice Coverage
- M.D. Program Student Catalog
- Transcripts
- 4th Year GPS
- FERPA
- M.D. Enrollment Verification
- Academic Records
- M.D. Credentialing & Degree Verification
- Establishing Florida Residency
- Registrar Forms
- Registrar FAQ

- Student Organization Directory (Arts in Medicine - Medical Informatics)
- Student Organization Directory (Movement is Medicine - Wilderness Medical Society)
- Room Reservations & Student Events
- Media Coverage
- Fundraising & Supplemental Funding
- PRFs: Everything you ever wanted to know about completing a PRF!

Every complete PRF packet includes 3 things: the PRF Form (found below), the order invoice (invoice receipt or shopping cart screenshot with links), and an event flyer with the SGA logo.

PLEASE do not use your own money for purchases you intend to use Activity & Service Fee dollars for! We unfortunately cannot get you reimbursed

Use this form to submit your PRF [2020-2021 Purchase Request Form](#) - If the form you are using looks different than this one - use this one instead!

Below you will find three examples of filled out & completed PRFs for the three most commonly used vendors/types of ordering: Publix, Amazon, and Papa Johns. Each piece of information you must fill in or provide has been highlighted in these packets. Note for Publix orders you must order through the Apron's Event Planners at the Publix at Cornerstone at Lake Hart (the one on Narcoossee & Moss Park Rd - their number is 407-275-5507) and that all food vendors must accept credit card payments via phone. If ordering from Papa John's make sure you state that you are a UCF COM Student Organization. This will signal to the store that they need to email you the order slip invoice that you must submit with your PRF packet. This will also signal to Papa John's to email Accounting the receipt their need for their records.

- [Complete Publix PRF Packet Example 2019](#)
- [Complete Amazon Order PRF Packet Example 2019](#)
- [Complete Papa Johns PRF Packet Example 2019](#) (use this as an example for any food vendor)



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

