OrgSync Funding Module Guide

A Step-by-step guide to requesting funding using the Orgsync funding module

<u>Steps performed by the student organization administrator(s):</u>

1. Log into OrgSync and access your organization's portal → hover your mouse over the tab "More"

   a. Click on "Treasury" to be directed to the next page

2. Click on "Manage Budgets"

3. Click on "New Budget" to begin the request process

4. From here you are required to provide details of your request and upload all supporting documents → this main funding page is broken down into various components:

   a. "Budget Name" – enter the name of your organization

   b. "Category" – click the drop down box and select the category of organizational funding your group is requesting (operating, project, travel). Operating consists of items/things that help the organization throughout the organization, projects consists of events, and travel includes trip to conferences, workshops, etc. → Once selected, a budget form will pop up that requires details about the request and provides legislative stipulations as outlined in the SGA Legislative Journal

      i. The information provided is used in processing the funding request, so it is very important that all answers provided are **accurate**

      ii. Once all questions are answered, click the "done" box at the bottom of the budget form

   c. "Name" – the name of the person filling out the request

Step 4b.i

https://orgsync.com/22631/budget/create_budget_request

WICHITA STATE UNIVERSITY

Search for anything...

Admin   My Memberships

Budget Period:
Spring 2015

Budget Details

BUDGET ITEM

Category:

No.Line Item

-- Select --

+ Add Lin

Fill Out

This budget ca

+ Add Summary

Operating - Operating Funding Request   ✕

Organization: REQUIRED
Please fill the the complete title of the organization as registered with Student Involvement Center

Organization Status: REQUIRED
If you are unaware of the current status of your organization please contact Student Involvement at 978-3022.

☐ Registered Student Organization

☐ Provisional Status Organization

☐ University / Community

Please list the primary contact for this organization. The contact listed below will be the sole intermediary between your organization and SGA. Be sure that the contact listed below will respond to all forms of communication on a daily basis.

https://orgsync.com/37439/budget/create_budget_request

WICHITA STATE UNIVERSITY

Search for anything...

Admin   My Memberships

Budget Period:
Spring 2015

Budget Details

BUDGET ITEM

Category:

No.Line Item

-- Select --

+ Add Lin

Fill Out

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+ Add Summary

Operating - Operating Funding Request   ✕

SGA. If this occurs, the organization will be responsible for paying any amount not reimbursed by SGA.

Additionally, I certify that the President, Vice-President, Treasurer, and Advisor are aware of this application for funding in the amount listed for the specified items and approve the expenses to be spent in the name of my organization.

I affirm that my organization is requesting money for the stated purposes. I understand that any and all funds allocated will be used for that purpose.

I affirm that I have read and understand the SGA Organizational Funding policies as described in the Student Government Association Legislative Journal, Section S027.

☐ I certify that I have read and understand the aforementioned Terms & Conditions

Step 4b.ii

Done

d. Click the "line item" drop down box and select the type, enter the $ amount requested under "Request a Budget" → it is to the organizations benefit to provide an exhaustive item description because it gives the SGA reviewers a more informed understanding of the request and can be beneficial when the Budget and Finance Committee presents to Senate before voting

    i. A description that only lists the item and no explanation will take more time to process because the SGA Treasurer will have to follow up for more information

e. If you have another category of organizational funding you would like to request, click on "Add Budget Item" and repeat steps 2b-d.

f. "Add Summary" – provide any additional information to support the funding request.

g. "Upload Documents" – upload the necessary documents required by the respective funding request, as outlined in the pop up budget form.

h. Click "Submit" when finished.

The SGA Treasurer will notify the organization's contact person that the funding request has been received. Funding applicants are required to attend a Budget and Finance Committee meeting to review the request and answer any questions the committee may have. Pending approval by the committee, the request will then be presented to SGA Senate the following week for final approval/denial. The result will be communicated by the SGA Treasurer to the organization's contact person.

Any questions can be directed to the SGA Treasurer at 316-978-7062 or sgatreasurer@wichita.edu.