- Banner
- P-Cards
- Tax exempt
- Concur Reporting Forms
- Fines and Offenses
- Reimbursements

- Check Requests for Vendors
- Deposits
- Fundraising
- Club Travel
- Resources
If you do not already have Banner access, please grab a Banner access form from the Student Activities office (RMC Room 202) or during treasurer training. Only those that have attended training are eligible to have access.
RICE UNIVERSITY

Administrative Systems Account Application and Security Agreement

**Instructions:** By completing this form you are requesting access to Rice University's administrative information systems. These systems include the SCT Banner Financial, Human Resources, Payroll, Student, and Financial Aid systems and custom extensions.

Applicants must complete Part 1, Part 2 (the User Agreement) and the appropriate pages that describe the access requested, i.e., Financial, HR/Payroll, Student, Financial Aid, Rice Web Applications, Campus Card, Parking, and SEVIS.

Return the completed and signed agreement to ADMINISTRATIVE SYSTEMS USER SECURITY MS-97. The applicant will receive an email with instructions when the account is ready for use.

---

**Part 1: Applicant Information**

(Print Clearly)

Full Name: ____________________________ Rice ID#: ____________

Student Name: ____________________________ Rice ID# ex: S01111111

Rice email address: youremail@rice.edu

Phone: _______ Department: _______

Posn Type: [ ] Faculty [ ] Staff [ ] Temporary [ ] Consultant [ ] Student Worker

Job/Title: ____________

[ ] New Account (NETID ____________ )

*** Please note your netid must be issued before applying for your Banner account. ***

[ ] Changes to Existing Account (USER ID: ____________ )
User Affidavit

I have read, do understand, and will comply with the Rice University's Code of Responsibility for Security and Confidentiality of Records, Files, and Databases and the procedure for Rice University Administrative Information System Access.

I am aware of my responsibilities to protect the confidentiality of the student information and agree to use information from this system for work related purposes only.

I accept the responsibility for maintaining the confidentiality and security of my password, and the data that I access.

Applicant's Signature: ___________________________ Date: ______________
### PART 4: FINANCIAL SYSTEM DATA ACCESS

**TYPES OF DATA:**
- [x] Financial Queries and Downloads
  - Payment Solutions Transactions & Purchasing Card History
  - Budget Information, Financial Transactions Queries and Downloads
  - Memo Reservations Detail

#### QUERY/DOWNLOAD FUNDS/ORGS SECURITY PRIVILEGES

| FUNDS – See Note Below | ORGS | ORGS
|-------------------------|------|------
| **ALL FUNDS WITHIN ALL ORGS LISTED ON THE RIGHT** | **ALL ORGS WITHIN ALL FUNDS LISTED ON THE LEFT** |
| Access* | Org Code/Name | Description/Org Name |
| "x" | 645000 | Student Activities |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |
| "x" | Q/B |

**IMPORTANT NOTE:** Unless stated otherwise, FUNDS listed on the left will be accessible within ALL ORGS listed on the right. (Exceptions FCGRSFO)

AND ALL Research Grants, Awards, and Proposals for the Principal Investigators listed below:

<table>
<thead>
<tr>
<th>1. Q/B</th>
<th>5. Q/B</th>
<th>9. Q/B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q/B</td>
<td>Q/B</td>
<td>Q/B</td>
</tr>
</tbody>
</table>

*Access Type Legend: Q=Query Only
B=Both Query and Data Entry

### PART 5: FINANCIAL SYSTEM DATA ENTRY

This part grants Financial Data Entry Privileges to the applicant, i.e., the ability to assist or change financial transactions. Circle 8 in the Part 4 access column above to indicate the funds and orgs for which the applicant is to have data entry privileges.

#### DATA ENTRY FORM (example)

- ALL DATA ENTRY PRIVILEGES
  - [ ] Check Requests
  - [ ] Memo Reservations
  - [x] Purchasing Card Reallocations
  - [ ] Travel/Ent/Hrs/Emp
  - [ ] Credit Card Deposit Voucher
  - [ ] Deposit Voucher (checks/ milfs)
  - [ ] Inter Department Transfer
  - [x] Expense/Revenue Corrections

1. Forms will not be added until a Training Course has been completed.
2. Contact Payment Solutions at payment@rice.edu
3. Forms will not be added until a training course has been completed.
4. Contact the Cashier’s Office at cashier@rice.edu
5. (This form requires Payment Solutions queries in part 4 above)
Banner request (New C-Fund)

For new or renewing clubs that do not yet have a c-fund.

- To request a new club fund (c-fund), email sactclubs@rice.edu with the following information:
  - Club Name
  - Plan for how you will utilize c-fund, and keep it sustainable from year to year
Banner login

You will need your net id and a password

- Look out for email from ADMIN SYSTEMS to notify you that your account is active
- Set your password – you have one week to do this or your link will be deactivated
- Questions regarding your password? Contact Admin Systems: admsys@rice.edu
- You will also need VPN (virtual provider network) access for your laptop
- Contact IT (helpdesk@rice.edu) for help with VPN access
Banner login

- Bookmark BANNER log in: http://edgar.rice.edu
  - Click Financial Queries tab > Budget Status (For WEbApps2 Only)
Enter in the following information:

- Fiscal Year: 2019
  - The Fiscal Year runs from July 1, 2018 to June 30, 2019
- Fiscal Period: Current or desired month
- Fund: Your club’s c-fund number
- Orgn: 545000
  - This denotes Student Activities

Click Submit to view your budget details
**Banner** current balance

<table>
<thead>
<tr>
<th>Account</th>
<th>Account Title</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>40100</td>
<td>Fund Balance</td>
<td>$77.93</td>
</tr>
<tr>
<td><strong>Computed Fund Balance:</strong></td>
<td></td>
<td><strong>$77.93</strong></td>
</tr>
<tr>
<td>Previous Month Ending Computed Fund Balance:</td>
<td></td>
<td>$77.93</td>
</tr>
</tbody>
</table>
Banner reports

Budget Status – a quick capture of the month’s activity

- Double click on each transaction to get details
- **Computed Fund Balance is your club’s current balance.**
  - Please Note: This may not include purchases you have just made.

Best Practices for Treasurers

- Print out the end-of-month budget status which gives a monthly report of your transactions (8-10 days into the next month), and attach the appropriate receipts.
- Keep in file for your records
- Pass on documentation to next year’s treasurer.
- Keep budget records outside of BANNER. Information displayed may be slow to update
P-Card
P-Card

- P-Card is a credit card. There is a high demand for P-Cards. Be aware that you might not always get one, so have backup plan!
- Report ALL P-Card charges on the Student Activities CONCUR Reporting Form
  - studentcenter.rice.edu > Student Activities > Financial Resources
  - Reports must be submitted within one week of p-card check out
- Return P-Cards within two (2) business days after checking out
- Person checking out the card must be the same person checking in the card!
  - The person checking the p-card out (and in) should also be the same person making purchases on behalf of your club. This helps to ensure the person making the purchase is aware of all the purchasing policies so your club does not incur fines or lose p-card privileges.
P-Card **dos and don’ts**

- Do use our Amazon P-Card with our Amazon Prime account!
  - We have a tax-exempt account for club use through the Student Activities office (RMC Room 202).
  - Make sure that you save the receipts in PDF Form while using the Student Activities computer so that you can submit a Concur form as well.
- Do use the Student Activities’ Sam’s Club/Walmart/Office Depot/Office Max cards.
- Do request itemized receipts for all purchases (displaying the cost and quantity of each item being purchased).
- Do have a fully executed contract in place (if required by vendor) before making a payment with a p-card.
P-Card dos and don’ts

- Do not use P-Cards as credit cards. You **must** have balance in your account before purchasing anything.
- Do not keep P-Cards for more than **two (2) business days** or a fine will be incurred.
  - If you need it for longer than two (2) days, check it in and check it out again.
- Do not pay tax.
- Do not pay for gas.
  - You can fill out a Mileage Voucher Form instead.
    [https://professor.rice.edu/uploadedFiles/Professor/Finance/Controllers_Office/Mileage%20Voucher.2.22.16.pdf](https://professor.rice.edu/uploadedFiles/Professor/Finance/Controllers_Office/Mileage%20Voucher.2.22.16.pdf)
- Do not use P-Cards at Student Run Businesses: The Hoot, Coffeehouse, Rice Bikes.
- Do not use P-Cards to purchase gift cards.
- Do not take a photo of the p-card. This is a security risk.
P-Card Quiz

- Must take and pass 10-question quiz on P-Card usage BEFORE you can check out a P-Card for your club
- You may take it multiple times until you pass with 100%
- Found on the Student Activities website at:
  - studentcenter.rice.edu > Student Activities > Financial Resources > P-Card Quiz
Tax exempt
Tax exempt for P-Cards

Please Note: Rice is exempt from paying state tax

- When making purchases for your club, please use the Rice University Tax Exemption Form
- Rice’s tax ID number is #74-1109620
- Tax exempt form available from here: https://studentcenter.rice.edu/sites/g/files/bxs1626/f/Tax-Exempt-Form.pdf or can be picked up from Student Activities
- Our exemption does not extend only in certain cases:
  - Airfare or out-of-state hotel - with Travel Request Form
  - Alcohol - if event has been approved
Tax exempt for travel

- In-State Hotel
  - Separate Texas Hotel Occupancy Tax Exempt Form available here: [https://studentcenter.rice.edu/sites/g/files/bxs1626/f/Tax%20Exempt%20Hotel.pdf](https://studentcenter.rice.edu/sites/g/files/bxs1626/f/Tax%20Exempt%20Hotel.pdf) or pickup from Student Activities
  - Only exempted from Texas state tax, and not city/county tax
    - E.g. Austin hotels still require you to pay city tax
- Not exempt from other states’ tax
- Not exempt from airlines’ tax
Tax exempt: hotel sample receipt

LA QUINTA INN & SUITES SHERMAN DENISON
2912 HWY. 75 NORTH
SHERMAN, TX 75090
903-870-1122

Folio#: 0953262864
Room: 402
Arrival: 01/19/18
Departure: 01/21/18
Returns Club No :
Voucher/Ship/PO:

<table>
<thead>
<tr>
<th>Trans #</th>
<th>Date</th>
<th>Description</th>
<th>Charges</th>
<th>Payments</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1144209</td>
<td>1/19/18</td>
<td>CC PMT - MASTER CARD ... 3339</td>
<td>$0.00</td>
<td>$430.14</td>
<td>($430.14)</td>
</tr>
<tr>
<td>1144229</td>
<td>1/19/18</td>
<td>Rm: 402 BAR - Best Available Rate</td>
<td>$65.00</td>
<td>$0.00</td>
<td>($365.14)</td>
</tr>
<tr>
<td>1144230</td>
<td>1/19/18</td>
<td>TAX - OCCUPANCY - CITY</td>
<td>$4.55</td>
<td>$0.00</td>
<td>($369.59)</td>
</tr>
<tr>
<td>1144240</td>
<td>1/19/18</td>
<td>Rm: 413 BAR - Best Available Rate</td>
<td>$65.00</td>
<td>$0.00</td>
<td>($295.59)</td>
</tr>
<tr>
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<td>$4.55</td>
<td>$0.00</td>
<td>($291.04)</td>
</tr>
<tr>
<td>1144242</td>
<td>1/19/18</td>
<td>Rm: 414 BAR - Best Available Rate</td>
<td>$65.00</td>
<td>$0.00</td>
<td>($226.04)</td>
</tr>
<tr>
<td>1144243</td>
<td>1/19/18</td>
<td>TAX - OCCUPANCY - CITY</td>
<td>$4.55</td>
<td>$0.00</td>
<td>($221.49)</td>
</tr>
<tr>
<td>1144529</td>
<td>1/20/18</td>
<td>Rm: 402 BAR - Best Available Rate</td>
<td>$69.00</td>
<td>$0.00</td>
<td>($152.49)</td>
</tr>
<tr>
<td>1144530</td>
<td>1/20/18</td>
<td>TAX - OCCUPANCY - CITY</td>
<td>$4.83</td>
<td>$0.00</td>
<td>($147.66)</td>
</tr>
<tr>
<td>1144549</td>
<td>1/20/18</td>
<td>Rm: 413 BAR - Best Available Rate</td>
<td>$69.00</td>
<td>$0.00</td>
<td>($78.66)</td>
</tr>
<tr>
<td>1144550</td>
<td>1/20/18</td>
<td>TAX - OCCUPANCY - CITY</td>
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<td>$0.00</td>
<td>($73.83)</td>
</tr>
<tr>
<td>1144551</td>
<td>1/20/18</td>
<td>Rm: 414 BAR - Best Available Rate</td>
<td>$69.00</td>
<td>$0.00</td>
<td>($5.83)</td>
</tr>
<tr>
<td>1144552</td>
<td>1/20/18</td>
<td>TAX - OCCUPANCY - CITY</td>
<td>$4.83</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Balance: $0.00
Tax exempt dos and don’ts

- Do not pay tax, even on expenses made on your own card
  - Tax will not be reimbursed!
- Do not pay tax and get “refunded for a discount”, any refunds/discounts are not a tax exemption do not count as “tax exempt”
- If you do end up paying tax, please bring the tax amount in exact change to the Student Activities office (RMC Room 202). We cannot deduct that amount directly from your C-Fund!
  - Refer to “Fines” section for fines pertaining repeated tax charges on P-Card
"Cash discount" is not a valid tax exemption
Concur Reporting Form
Concur How-to’s

- This is a Qualtrics form created by Student Activities - accessible on studentcenter.rice.edu > Student Activities > Financial Resources
- Fill the CONCUR Form out one week or sooner within date of purchase
  - Upload copies of itemized, tax-free receipts
  - If event involves food or entertainment expenses:
    - Over 9 people attended: Attach a flyer or email for the event
    - 9 people or less attended: Provide a list of attendees and their Rice affiliation (staff, faculty, or student)
  - If event involves alcohol: Attach an APPROVED email from Student Activities Office (eventrm@rice.edu) or APPROVED form if a graduate club
  - If event involves travel outside of Houston: Attach Travel Request Form (please save the email response as a PDF and upload it to CONCUR)
Fill in event details or purpose of purchase
Indicate all applicable funding sources and respective fund numbers

Fill in event details or purpose of purchase

Purpose

Funding
Concur

Fill in event details or purpose of purchase

Purpose

Record the last 4 digits of the credit card you checked out

P-Card #

Indicate all applicable funding sources and respective fund numbers

Funding
Concur

Purpose
Fill in event details or purpose of purchase

P-Card #
Record the last 4 digits of the credit card you checked out

Funding
Indicate all applicable funding sources and respective fund numbers

Receipts
Maximum of 5 receipts for same event (Please upload in one form, not separately)
Concur

Fill in event details or purpose of purchase

Record the last 4 digits of the credit card you checked out

Attach a flyer or other acceptable forms if food or drinks are purchased

Purpose

P-Card #

Flyer

Funding

Indicate all applicable funding sources and respective fund numbers

Receipts

Maximum of 5 receipts for same event (Please upload in one form, not separately)
Indicate all applicable funding sources and respective fund numbers.

Record the last 4 digits of the credit card you checked out.

Attach a flyer or other acceptable forms if food or drinks are purchased.

Fill in event details or purpose of purchase.

Maximum of 5 receipts for same event *(Please upload in one form, not separately)*.

If alcohol or travel is involved, attach relevant documents.
Concur **do’s and don’ts**

- Do submit both itemized receipt *and* credit card receipt (especially if you have added a tip to the purchase)
- Do indicate tip on itemized receipt if credit card receipt is not present
- Do submit refund confirmations/receipts
- Do put multiple receipts on one form for the same event
- Do save the Travel Request Form (received as an email after submission) as a PDF for attachment to Concur
- Do not indicate a different monetary amount on the form from what is shown on your receipt
- Do not submit email *body text* (Microsoft document) as your event “email screenshot,” you need to include the recipient list/listserv in the email screenshot to show it was sent
The above example would not be approved. Flyers or Facebook posts need to include event details such as venue/time/date!
Invoices will only be accepted if it is paid or balance due is zero.
This is not considered an itemized receipt as there is no price per line item.

<table>
<thead>
<tr>
<th>Table</th>
<th>Guests</th>
<th>Server</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>7691-48</td>
</tr>
</tbody>
</table>

8th Sunday
1 Big Pay 5 PM
Pan Bhaji Bhaji
1 Big Chilly Cheese
100 PCS Pay

$ 40 Dholaq
If you have a refunded charge, we will need a refund confirmation as well as the original receipt.
Fines
Fines (effective Fall 2018)

Late P-Cards, Missing Receipts, Tax
- First offense: warning
- Second offense: $10 fine
- Third offense: $25 fine
- Fourth offense: P-Card privileges revoked

Late Receipts/Concur Report
- 8 days late: $10 fine
- 15 days late: $20 fine
- 22 days late: $30 fine
- More than 30 days late: $50 fine and loss of P-Card privileges
Additional Penalties

Fail to register and receive approval for a club event with alcohol or taking place at Willy’s Pub, before making any alcohol-related purchases

- Details sent to Student Judicial Programs (SJP)
- Lose p-card privileges
- Lose privilege to apply for SAPP funding
Reimbursements
Reimbursements

- Less than $100
  - Petty Cash Voucher
- Mileage (Voucher Form)
- More than $100
  - BME Form (if food or entertainment)
  - BME Form
Use a Petty Cash form for individual receipt reimbursements under $100

Available from Student Activities or online: https://cashier.rice.edu/sites/g/files/bxs961/f/PETTY%20CASH%20VOUCHER.pdf

Submit to Student Activities office with original, itemized receipts attached

If business meeting or food/entertainment is involved, a BME Form should also be attached along with…

- If over 9 people attended: Attach a flyer or email for the event
- If 9 people or less attended: Provide a list of attendees and their Rice affiliation (staff, faculty, or student) an event flyer

Bring to Cashier’s after approval from Student Activities
Use a Business Meeting/Entertainment Expense (BME) Form for individual receipt reimbursements over $100

Available from Student Activities or online: https://studentcenter.rice.edu/sites/g/files/bxs1626/f/BME.pdf

Must attach original, itemized receipts without tax (you will not be reimbursed for any tax you pay)

- If over 9 people attended: Also attach a flyer or email for the event
- If 9 people or less attended: Also provide a list of attendees and their Rice affiliation (staff, faculty, or student) an event flyer

Student Activities will then submit a reimbursement request, which may take up to two weeks to be processed
**Reimbursements: Mileage**

- Use for reimbursement of mileage traveled
- Available from Student Activities or online: [https://professor.rice.edu/uploadedFiles/Professor/Finance/Controllers_Office/Mileage%20Voucher.2.22.16.pdf](https://professor.rice.edu/uploadedFiles/Professor/Finance/Controllers_Office/Mileage%20Voucher.2.22.16.pdf)
- Submit Mileage Voucher Form with:
  - Travel Request Form
  - Distance traveled (attach printout of Google Maps, Mapquest, etc.)
- Reimbursements of $0.545/mile
  - If your club wants to reimburse the driver for less, amount needs to be specified on form
Check Requests for Vendors
Check Requests for Vendors

- Use for non-food/entertainment related items over $100, such as payment of a non-Rice person (speaker, DJ, etc.)
- Fill in BME Form
  - Attach back-up information which provides details as to why you are issuing a request for specified amount (*This can be an email, invoice, receipt, or fully executed contract*)
  - *If over 9 people attended:* Also attach a flyer or email for the event
  - *If 9 people or less attended:* Also provide a list of attendees and their Rice affiliation (staff, faculty, or student) an event flyer
- Fill in the “Check Request Form” (Google Form) available at Student Activities front desk so that your check request will be placed in an approval queue

*Continued on Next Slide*
Check Request for Vendors

- **Non-Rice Payments**
  - Attach W-9 form for non-Rice individuals or companies (if making payments for honoraria, performances, DJ services, etc.)
    - You cannot be reimbursed for salary payments, so do not pay out of pocket!

- **Rice Student Payments (**not reimbursements**)**
  - Student will need to submit an I-9 form to Payroll before any of services are rendered
  - If I-9 is not completed before services are rendered, an $1,100 Federal fine will be levied
  - Also provide the following information to Student Activities:
    - student worker's name, student ID, and work study status
  - A fringe benefit of 1.5% (rate as of 2017/2018 fiscal year) will be charged to the club

- **Rice Staff/Faculty Payments**
  - Contact Student Activities ([sactclubs@rice.edu](mailto:sactclubs@rice.edu)) to review honoraria process
Deposits
Deposits: Cash

- Sort and count the cash before you bring to Student Activities
- Put the bills face up in the same direction. Bag the cash in an envelope and count change. Total the amount. Write the following on your envelope:
  - Club Name & Your Name
  - C-Fund number
  - Amount enclosed
  - Purpose (donation, fundraiser, etc.)
  - Date
- You will fill out a Deposit Form on a laptop in Student Activities
- You will be given a paper receipt for your deposit
Deposits: **Checks**

- Recommended to make photocopies of any checks (keep for your records)
- Put the check in an envelope. Write the following on your envelope:
  - Club Name & Your Name
  - C-Fund number
  - Amount enclosed
  - Purpose (donation, fundraiser, etc.)
  - Date
- You will fill out a Deposit Form on a laptop in Student Activities
- You will be given a paper receipt for your deposit
Deposits: Money Transfers

- Use an Interdepartmental Transfer (IDT) to transfer funds between University Departments and/or C-funds
- Fill out IDT Request Form (Google form) available at Student Activities front desk
- Receiving club needs to show proof of email from providing club that they are transferring the specified amount to requesting club
- Provide C-Fund/Org number of both receiving club and providing club, as well as purpose of transfer
Fundraising
Fundraising: Donations

Solicitation:
For solicitation of funds outside the campus community, you must seek the approval of the Office of Student Activities. No individual student or club, may solicit funds through advertisements, patrons' bids or otherwise, from anyone other than active student members of the clubs, without prior approval of the Student Activities Office. The approval process involves both the Office of Student Activities and the Development Office. The process can take up to one month, so be sure to plan ahead!

- A list of vendors/companies and a copy of your solicitation letter should be sent to sactclubs@rice.edu for approval.
**Fundraising: Donations**

**Solicitation:**

In the letter you must specify that any checks should be made out to Rice University with your club name in the memo, and mailed to the Student Activities Office (address shown below).

- Student Center - MS 530
- 6100 S. Main St.
- Houston, TX 77005

*Donations can also be made online as well (see upcoming slide for more info).*
Fundraising: Donations

How to deposit gifts/donations (mailed or in-person):

1. Bring checks, any documentation from donor, and the corresponding thank you note to the Student Activities Office (to be sent to Rice Development Office)
   - If mailed, ensure checks sent to Student Activities Office using the address below:
     Student Center - MS 530
     6100 S. Main St.
     Houston, TX 77005

2. Development sends out receipt to your donor (to be used for tax purposes) and deposits the gift into a general gift account

3. Student Activities releases the money to your c-fund when we verify that your thank you note has been sent
   - Please Note: Student Activities will provide postage for Thank You notes!
Fundraising: Donations

How to make an online donation:

1. Visit giving.rice.edu and click the “Make a Gift” button in the top right corner of the screen
2. Under “Designation” select “Other”
3. In the “Special Instructions” box, include the student organization name and provide the following Student Activities Gift Fund number: G80483 545000

Please Note: If a donor receives any type of compensation (t-shirt, cd, ticket, etc.) for their donation, the money MUST NOT be deposited into the gift account, but should go to your C-fund.
Fundraising: Grants/Funds

- List of available grants and funding sources on campus available on the Student Activities Website:
  
  https://studentcenter.rice.edu/student-activities/group/club-resources/financial-resources/grants

  - Student Activities President's Programming (SAPP) Fund
    - Any registered club can apply for SAPP funds to support their public event that may benefit the Rice community
    - Link is on Student Activities page under Club Resources > Financial Resources > SAPP Funding

  - Student Association Initiative Fund - Applications accepted once per semester

  - ALFA Fund - Available through the Office of Multicultural Affairs

  - New Club Fund - Available throughout academic year to new clubs only
Fundraising: Grants/Funds

- GSA Grants
  - GradStarter - [http://gradstarter.rice.edu](http://gradstarter.rice.edu)
    - GSA Enrichment Grant
    - GSA Professional Development Grant
    - Graduate Student Activity Grant (also for individuals)
    - GSA Community Service Funding
Fundraising: Boba/Bake Sales

- Before you host a bake or beverage sale, you must take a “Food Safety & Sanitation” class hosted by Joyce Myles (azora@rice.edu) from Housing and Dining.
- Clubs are allowed to sell Boba in the RMC one weekday, every other week for only one semester, so please request a table accordingly:
  - Table requests available at rooms.rice.edu
- Refer to rules and guidelines at https://studentcenter.rice.edu/facilities-events/group/reservations/boba-bake-sales
  - Forms for Food & Beverage Sales https://studentcenter.rice.edu/facilities-events/group/reservations/boba-bake-sales
  - You must bring in the registration form to the Student Center Administrative Offices, in the RMC Room 202 above the Grand Hall, at least 48 hours before your sale date.
- Failure to comply with bake, boba, and other food sales policies will result in your event/reservation being canceled.
**Fundraising: Registration Fees**

- **Creating an Online Registration Site for Events**
  - Venmo is not currently an approved method for collecting funds
  - Clubs are encouraged to request a [signup.rice.edu](http://signup.rice.edu) account by emailing [sactclubs@rice.edu](mailto:sactclubs@rice.edu) instead
  - Through this site you will be able to collect registration information for your event and collect registration fees which will be deposited directly into your club’s c-fund
  - There is a 3% fee to process each transaction so make sure you include that when you set your registration fees.
**Fundraising: Merch Sales**

- **Merchandise Sales**
  - If you would like to sell t-shirts or other merchandise for your club, this can also be done through signup.rice.edu
  - Email sactclubs@rice.edu to setup an account
  - There is a 3% fee to process each transaction so make sure you include that when you set your registration fees.

- Raffles are not allowed as a fundraising activity
Club Travel
Club Travel: Travel Form

- Fill out "Travel Registration Form" prior to departure
  - If this is done by another member of your club, be sure they email you a copy of the submitted form to attach to the Concur Reporting Form with any travel related receipts
- Keep all travel appropriate itemized receipts (conference registration, hotel, airfare, transportation to and from the airport, meals are only partially covered on travel days, etc.).
  - If you plan to request Petty Cash reimbursement when back on campus, be sure to keep the original versions of the receipts!
- Do not use the p-card to purchase gas. Instead, club members can be reimbursed for mileage by completing a Mileage Voucher Form, and accompanying paperwork.
If traveling within Texas, pay with a club PCard, and fax the reservations office the “Texas Hotel Tax Exemption Form” when booking hotel. You can do this from the Student Activities Office.

- You will still have to pay local and county tax.

For any expenses where the student is required to present the credit card at the place of purchase, e.g. a hotel reservation, they will need a credit card authorization form. Steps for doing this are available here: https://studentcenter.rice.edu/student-activities/group/club-resources/financial-resources/p-cards
Resources: **Sample Budget**

Email [sactclubs@rice.edu](mailto:sactclubs@rice.edu) to request a Sample Budget Template.

### Account Budget Summary

**SAMPLE**

Fiscal Year 2018-2019

<table>
<thead>
<tr>
<th>Operations</th>
<th>Anticipated Budget</th>
<th>Expenditures to Date</th>
<th>Pending</th>
<th>Remaining Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Productions</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Development</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Cocktails</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Marketing</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Performances</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Vice Chair</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Chair</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Special Events</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Travel</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>General Operating</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Budget Total</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

### Operations

**SAMPLE**

<table>
<thead>
<tr>
<th>Date</th>
<th>Vendor</th>
<th>Description</th>
<th>Pending</th>
<th>Expenditures Total</th>
<th>$</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Resources: Event planning

- Rooms.rice.edu
- Signup.rice.edu
- Events with Alcohol Approval Procedures - [https://studentcenter.rice.edu/campus-events](https://studentcenter.rice.edu/campus-events)
- Minors on Campus Procedures - [https://studentcenter.rice.edu/student-activities/group/club-resources/forms](https://studentcenter.rice.edu/student-activities/group/club-resources/forms)
- Equipment Rental (free for clubs) - [https://studentcenter.rice.edu/facilities-events/group/rental-equipment](https://studentcenter.rice.edu/facilities-events/group/rental-equipment)
- Forms (Financial, Use of Image, Minors, Travel, etc.): [https://studentcenter.rice.edu/student-activities/group/club-resources/forms](https://studentcenter.rice.edu/student-activities/group/club-resources/forms)
Resources: Event planning

- Club Printing
  - Through Student Activities
    - Copier Codes available from our office to link directly to c-fund
    - Costs
      - $0.05 per black & white copy
      - $0.15 per color copy
  - Through MUDD or other on-campus print source
    - Can be reimbursed through the Student Activities office.
    - Email helpdesk@rice.edu and request a list of your itemized printing charges.
    - Provide copy of itemized receipt to Student Activities, along with a Petty Cash Form.