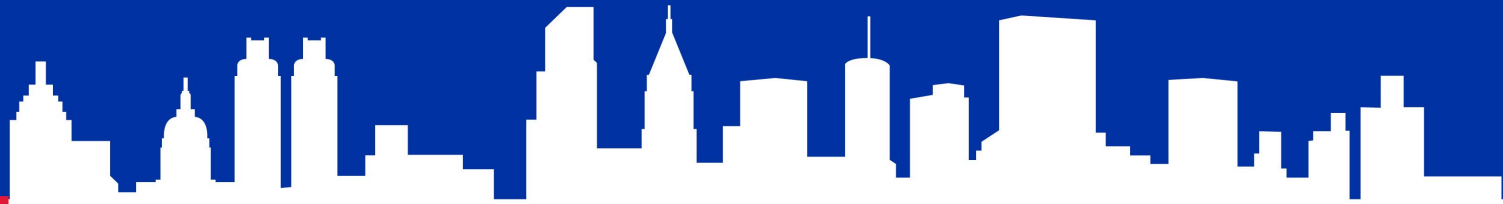


Registered Student Organization (RSO)

Budget Purchasing
&
PIN for SAF Funding



Agenda



1. Student Activity Fee(SAF) Committee Protocol Manuel
2. Purchase Requests
3. Event Management
4. Reconciliations



Student Activity Fee Business Support is here to help RSO leaders with business transactions...

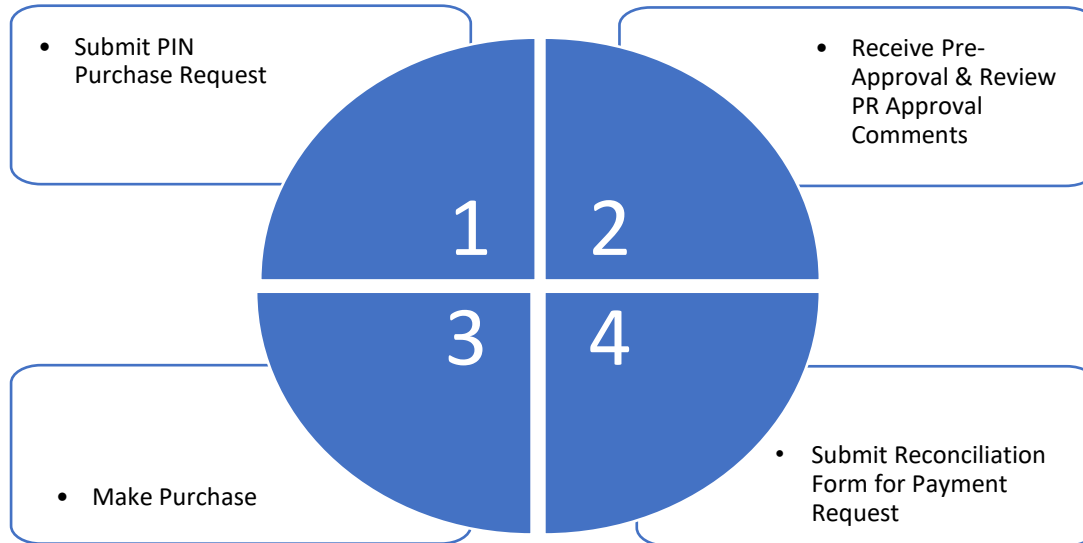
- On Campus (Panther Dining, Paw Prints, Campus Partners)
- Off Campus (Georgia Vendors (tax exempt); In-State (tax exempt) "[GSU VENDOR ADD FORM](#)")
- Nonemployee (DJ's, Speakers, Performers, graphic artists are not funded by SAFC)
- Pre-approved Transactions



THE PROCESS EXPLAINED



HOW DOES THE PURCHASING PROCESS WORK?



Keep in Mind



- Award Letter should have been received.
- On-Campus advisors must be a full time GSU employee. (teaching, administrative, and research, post-doctoral students, etc., are ineligible to serve as advisors)
- RSO's will no longer have access to their speedtype, attempts made will not budget check; speedtypes will now be managed by centralized budget business team and campus leads.
- Any University property damaged will be charged to the RSO's budget.
- Use "Supported by Student Activity Fees"
- **No** Administrative Fees. **No** Late Fees.
- [Student Activity Fee Committee SAFC Protocol Manual](#)



*Any funding left in the budget at the end of the Fiscal Year will not carry forward. A budget proposal must be submitted for each academic year.

Inquiries:

- Allocation decisions: safc@gsu.edu
- Vendor relations, budget balances, accounts payable, and business processes email the centralized budget team: safsupport@gsu.edu
- Annual registration and PIN issues: studentorganizations@gsu.edu



What qualifies as an RSO function:

In general, a program **HAS** three main components:

- Planned function organized by an individual or a group
- Does not cater to club members; invokes non-member interest & attendance
- Teaches a new skill, provides knowledge, demonstration, seminars, performance, etc.
- **A PROGRAM IS NOT:** Closed, member only benefits, says it's open to all for the sake of an expense approved but caters only to a specific classification, no off-campus events or programs

What qualifies as an RSO promotional item:

A promotional item is **NOT** :

- Used as gifts or perks for club members
- Does not cater to just members; invokes non-member attendance & interest
- Inventoriable item
- A promotional item **IS:** Direct use associated with student activity fee events

PLAN EARLY & MARK YOUR
CALENDAR!



REQUEST TIMELINES

Spending Request Submission Timeline

- At least 30 days prior to Event/Program date
- At least 60 days prior to Travel
- Flexibility is being extended for events within the next 30 days of completing this training(Amazon purchases by SAF Business Support need at least 14 business days) Starting tomorrow RSO must adhere to established timelines.

Funds spent out-of-pocket in advance, before obtaining pre-approval, will be the responsibility of the individual(s) who incurred the expenses. To take advantage of early bird discounts, for conference registrations, pre-approvals are still necessary and can be submitted at any time before the travel period.

PURCHASE REQUEST FORM SUBMISSION

To submit a purchase/spend request:

1. Go to <https://pin.gsu.edu> and Sign In.
2. Click on the menu button in the upper left corner.
3. Look for your RSO name and click on the gear icon.
4. Choose Finance.
5. Click on the "Create Purchase" button.
6. Choose "Create Purchase Request."

Please include the following in the Description of the Purchase Request:

1. Event Name
2. Event Date and Time
3. Event Location
4. Expected Number of Attendees
5. Type of Event (e.g., conference, workshop, etc.)
6. Purpose/Agenda of the Event

Event advertisements will be checked at the time of purchase request submission.

Regardless of purchasing method, supporting documentation is required to be uploaded with the Purchase Request Form.

The image displays two screenshots of the Panther Involvement Network (PIN) web application. The left screenshot shows the 'Finance' menu option selected in the left-hand navigation bar. The right screenshot shows the 'Create Request' page with the 'Create Purchase Request' button highlighted in red.

Payment Methods



- **Purchase Order (PO):** An agreement to procure a good/service with a quote. Payment is issued Net 30 (which mean calendar days from the receipt of good and/or services, or the receipt of invoice in GSU).
 - i.e. Amazon orders that the RSO would like the SAF Business team to place. (Please ensure to provide the team with a list of items needed, along with the links.)
- **Payment Request (PR):** allows receipt of a good/service FIRST. Payment is issued to the vendor within 7-10 business days after a proper event reconciliation packet and a final invoice is submitted.
 - i.e. any service provider or vendor you would like the SAF Business team to pay directly.
- **University Check:** For pre-paid lodging & registrations.
 - SAF Business team will make payment to vendor. *Note: Checks are not distributed to student/advisor for prepayment.
- **Direct University Charge:** Panther Dining, Paw Prints, Student Center Reservations, Bookstore, Other Campus Services.
 - Instructions on how to proceed with order will be added to the Purchase Request approval.
- **Reimbursement:** Current Georgia State University student, faculty or staff advisor incurs the expense by paying out of pocket. Reimbursements **will not** be made to any persons that is not a GSU student, faculty or staff.



DECISION RECEIVED BY EMAIL

Please make sure to log into PIN to review the Purchase Request for any additional instructions or contingencies. If a denial is received, please review the comments for further guidance.

If you are utilizing the services of one of our Campus Partners, a speedtype will be provided at that time.
Please allow 3 business days for a response.

PANTHER INVOLVEMENT NETWORK

Search...

Purchase Request #4 \$ [REDACTED]

Tuesday, March 21, 2023 1:56 AM (2 months ago)

Submitted By [REDACTED] Organization [REDACTED]

Request Title
[REDACTED] 2023 National [REDACTED] Association Show

Request Description
The National [REDACTED] Association Show is the must-attend event for every member of the [REDACTED] and [REDACTED] industry. As the world's most influential showcase of [REDACTED] innovation and inspiration, it's where every trend, solution and category are represented — connecting industry leaders with the people and products they need to thrive in today's business environment.

Students will join peers from across the industry for a future-forward experience where they'll discover everything it takes to stay revenue-driven and relevant — from tantalizing tastes for menus to actionable solutions for streamlining services, payments and more. As well as the opportunity to test innovative new equipment designed to power automation and profits, engage with expert-led education on today's hottest topics and build connections with key suppliers and [REDACTED] professionals from around the world.

Additional Questions [REDACTED]

Transaction History [REDACTED]

Stage History [REDACTED]

Moved to Purchase Authorized
3/23/2023 10:05PM (2 months ago) by [Latisha Barnes](#)

Comment:
Send email to safsupport@gsu.edu to request travel budget meeting.
\$750 max allocation per student to include registration fees.

Reviewer Comment [REDACTED] EDIT ✓
Editable memo visible to anyone who can view this request
No reviewer comments

Status: Approved
Stage: Purchase Authorized
Category: Lodging
From Account: [REDACTED] Balance: \$ 3000.00
Organization: [REDACTED]

If you would like to communicate with our team regarding a Purchase Request, please email us at safsupport@gsu.edu. Do not use the discussion board, as our team does not receive notifications for messages posted there.

Discussion

Dulce Puga

Leave a message

Choose File No file chosen

CANCEL POST

Always check Spam or Junk Folder!

Sample of email



Purchase Request Approved



noreply@engage.mail.campuslabs.com
To Dulce Puga Tinajero



Thu 3/28/2024 11:09 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

Purchase Request Approved

Your purchase request, **PB&J Conference - Food for Student Activity Fee - University Wide**, that was submitted on **Thursday, March 28, 2024 11:07 AM** has been **Approved**.

Click Here to review
Approved Purchase Request

[View Purchase Request](#)

You are receiving this email because you are a member of Panther Involvement Network (PIN).
Manage your [email preferences](#).

CAUTION: This email was sent from someone outside of the university. Do not click links or open attachments unless you recognize the sender and know the content is safe.



Food for On-Campus Events



- ❑ Pre-approval amount will be based on **several factors**. Please note that reimbursement/payment will be based on per diem according to attendance, not to exceed PR approved amount.
- ❑ **Food Per Diem:**
 - **Snack:** \$8.00 per student
 - **Meal:** \$14.00 per student
- ❑ Per diem must be in accordance for all food purchases. Taxes and service fees/tips are included in the allowable per diem.
- ❑ 10% Tips or Service Fees, but not both, are permissible up to but not limited to \$50.00 within reason. RSO's are expected to pick up food for events.
- ❑ SAF Funds are not permitted to be used to cover gratuity charges to Panther Dining.
- ❑ Please note that GSU is a Coca-Cola product campus, and Pepsi products are not to be purchased with SAF funds.



Service Providers



- ❑ Service providers include; DJ's, Guest Speakers, Non-employee individual.
- ❑ DJ's and Performers must obtain a certificate of insurance. Proof of insurance must be provided prior services being rendered.
- ❑ When you submit Purchase Request for a Service Provider you will need to provide contact information.
- ❑ Please inform the vendor that someone from our team will contact them within 7 business days to have service provider worksheet signed and retrieve any further needed documentation.
- ❑ After pre-approval has been granted, please check back. You may move forward with Service Provider once the stage has been changed to Vendor/Non Employee Hire Process Completed.

A screenshot of a web form. The 'Status' dropdown menu is highlighted with a blue and orange border and shows 'Approved' with a downward arrow. Below it, the 'Stage' dropdown menu shows 'Vendor/Non-Employee Hire Process Comj' with a downward arrow. At the bottom, there is a label for 'Stage Change Comment (optional)'.

Status
Approved ▼

Stage
Vendor/Non-Employee Hire Process Comj ▼

Stage Change Comment (optional)



New Vendors

NEW Vendors are added with either GSU Vendor Authorization Form **or** the Vendor's W9

Download Vendor Form if needed and have vendor email it to: safsupport@gsu.edu


Form is not required for students, faculty or staff.

GEORGIA STATE UNIVERSITY PURCHASING W-9 & VENDOR AUTHORIZATION FORM		DO NOT SEND TO BIR
Foreign persons who are non-residents for US Tax purposes do not complete the GSU Substitute W-9 form. Instead, complete IRS Form W-9-BEN available at http://www.irs.gov/pub/irs-soi/12/w9ben.pdf		
Note: Use of Social Security Number rather than a EIN puts you at higher risk of identity theft. Please see link below for setting up an EIN: http://www.irs.gov/efile/irs-efile-apply-for-ein		
▶ Taxpayer Identification Number (TIN)		Employer ID Number (EIN)
▶ LEGAL NAME: <small>(Send each TIN down)</small>		
CONTACT INFORMATION BELOW - ** REQUIRED **		
▶ LEGAL MAILING ADDRESS: <small>(When tax information and general correspondence is to be sent)</small>		
SUA (Branch Location):		
ADDRESS:		
ADDRESS LINE 2:		
CITY:	ST:	ZIP:
TELEPHONE #:	FAX #:	E-MAIL ADDRESS:
CONTACT INFORMATION ABOVE - ** REQUIRED **		
▶ READY TO ADDRESS: <input type="checkbox"/> Same as Legal Mailing Address		
SUA (Branch Location):		
ADDRESS:		
ADDRESS LINE 2:		
CITY:	ST:	ZIP:
▶ ENTITY TYPE		
<input type="checkbox"/> Individual (not a business) <input type="checkbox"/> Self-Employed/proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> LLC/limited liability company		
SECTION 1 - FEDERAL INFORMATION - REQUIRED		
What is the Federal Classification type of your business? - See definitions on link below. (State of Georgia Small Business definition) https://www.sba.gov/resource/size-standards-sba-size-standards-federal-classification		
OWNERSHIP AND/OR SBA CATEGORY MUST SELECT AT LEAST ONE FORM WILL NOT BE PROCESSED IF INCOMPLETE. Please check all that apply to your business.		
<input type="checkbox"/> Single Business <input type="checkbox"/> Minority Status <input type="checkbox"/> Disabled Veteran <input type="checkbox"/> Minority Owned/Minority Owned/Contract/Service Provider		
<input type="checkbox"/> Historically Black College <input type="checkbox"/> Woman Owned <input type="checkbox"/> African American <input type="checkbox"/> Individual Owner/Volunteer		
<input type="checkbox"/> Non-Profit <input type="checkbox"/> Small Business - SBA Certified <input type="checkbox"/> Asian American <input type="checkbox"/> Individual/Contract/Service Provider		
<input type="checkbox"/> Minority Designated University <input type="checkbox"/> Disadvantaged - SBA Certified <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> Faculty/Staff/Staff Assistant		
<input type="checkbox"/> Private University <input type="checkbox"/> (Must complete minority status) <input type="checkbox"/> Native American <input type="checkbox"/> Native American		
<input type="checkbox"/> Public University <input type="checkbox"/> Pacific Islander <input type="checkbox"/> Veteran - SBA Certified <input type="checkbox"/> Veteran - SBA Certified		
<input type="checkbox"/> Hub Zone - SBA Certified <input type="checkbox"/> Service Disabled Veteran - SBA Certified <input type="checkbox"/> War Near Veteran - SBA Certified		
SECTION 3 - CONFLICT OF INTEREST - REQUIRED		
Are you or any Officer, Owner or Partner in this company an employee of Georgia State University? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Are any family members employees of GSU? If yes, who is the person's name and what is your relationship to the person? <input type="checkbox"/> Yes <input type="checkbox"/> No		
▶ CERTIFICATION		
I, the undersigned, certify that the information provided on this form is true and correct to the best of my knowledge and belief, and that I am not a student, faculty, or staff member of Georgia State University.		
I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.		
I am a U.S. person (including resident alien).		
Certification Instructions: You must read and check 2 areas if you have been notified by the IRS that you are currently subject to backup withholding because you have had an account and/or contract with any government.		
The Signature of the U.S. Self-Employed or Partner in this company must be printed on the bottom of this form and signed in black ink.		
Signature of U.S. Self-Employed:		Date:

FORM WILL NOT BE PROCESSED IF NOT SIGNED OR COMPLETED BY VENDOR.
Only the U.S. Self-Employed or Partner in this company is to be signed.

SAMPLE: SUBMITTED PRIOR TO TRAVEL (REQUIRED FOR IN/ OUT OF STATE TRAVEL)

Georgia State University
Travel Authorization - Student
[View State of GA-Statewide Travel Policy Here](#)



Purchase Order # (when available)		Created After Submission
<small>(Attach Travel Authorization to the PantherMart requisition when creating a Travel PO)</small>		
Student/Traveler's Name		Bleed Blue Jones
Student/Traveler's Address		55 Panther Street
<small>(Street)</small>		
<small>(City, State, Zip)</small>		Atlanta, Georgia 30303
Traveler's Panther / Vendor ID #		000-11-2222
Dates of Travel		01/01/2020
<small>Departure Date (mm/dd/yyyy)</small>		
<small>Return Date (mm/dd/yyyy)</small>		01/03/2020
Travel Destination (City, State)		Tampa, Florida
Full Name of Event		Official Approved Conference for Students
Purpose of Travel:		To attend the 2020 student leadership conference.
<small>Must include your purpose for attending the event listed above.</small>		
Traveler's Home Department :		
<small>Dept. Name</small>		
<small>Dept. Number</small>		
Account to Charge Information		
<small>Speedtype/Project ID</small>	<small>Fund Code</small>	<small>Amount Charged to Speedtype</small>
SASPEEDTYPE		
Estimated Travel Expenses		
<small>(Only include expenses for which you plan on requesting reimbursement)</small>		
Account	Description	Amount
650100 - Student Travel	Airfare(Purchased directly by University)	\$ 600.00
650100 - Student Travel	Airfare (Not Purchased directly by University)	\$ -
650100 - Student Travel	Ground Transportation	\$ 80.00
650100 - Student Travel	Meals	\$ 100.00
650100 - Student Travel	Lodging	\$ 100.00
650100 - Student Travel	Parking	\$ 50.00
650500 - Student Mileage	Reimbursable Mileage	\$ -
650100 - Student Travel	Miscellaneous Expenses (Describe Below)	
	Baggage Fees	\$ 60.00
Signature Approval/Authorization of Travel Expenditures		Printed Name / Date
Traveler: <u>STUDENT SIGNATURE. PRINTED NAME & DATE</u>		
Department Head Approval: _____ / _____		
Budget/Project Approval: <u>ADVISOR SIGNATURE. PRINTED NAME & DATE</u>		
<small>(If diff. from Department Head Approval)</small>		

Travel Authorization

- Each student will need a travel authorization completed signed by the RSO on campus advisor; this is done PRE-TRAVEL
- \$750 maximum funding for any individual student per trip
- SAFC will typically fund one travel activity per fiscal/academic year for a student unless there is some form of progressive accomplishment (competition) or as otherwise advised by the SAFC Chair or VPSE.

Travel Supporting documentation

- Conference agenda/schedule and or conference link.
- Registration Forms (if applicable)
- A list of students traveling to include full name, DOB, Panther ID#, student email, address, and phone number.
- Student Travel Authorization Form
- Quotes (flight/lodging/registration)

Travel Authorization Forms MUST be signed by Faculty/Staff advisor.

Use of AirBnB's, VBRO's, Home Away type rentals will not be covered by your activity fee budget.





PIN Event Check-In App & QR Code Instructions

<https://youtu.be/O3esCVvRe6s>

&

<https://youtu.be/flb4ysPQjY8>

Handwritten sign-in sheets are **not** permissible.



For Payments & Reimbursements



A **PA** Reconciliation Form Must be Submitted

Travel and Registrations (General Expenses, Recruitment materials, Reimbursements (travel or operating), Expenses NOT tied to an RSO event or program.) **A Travel Summary must be submitted for all travel and registration expenses.**

Events & Programming (Expenses related to on-campus events & programs)

Travel Summary (SAFC) PROTOCOL MANUAL 3.6 TRAVEL ASSISTANCE FUNDS Anyone receiving travel assistance from SAFC will be required to complete a post-travel form demonstrating how the travel funds were used and how participation in the travel contributed to the RSO and GSU, including required participation in any knowledge sharing activities that the university may sponsor (poster presentations, student travel symposium, online blog, etc.)

On-Campus Advisor Recon Approval



A thumbs up in the SAF RSO Reconciliation Form from your on-campus advisor is **required** in order to proceed with the expense payment.

During the reconciliation form submission, you must add your on-campus advisor's email under 'Add Reviewers' to grant them access and allow them to approve the form.



SAF RSO Funding Reconciliation Form

Add Reviewers

Enter the email of your Faculty/Staff Advisor (any other emails will result in form denial).

Enter up to five email addresses that will be added as Reviewers to your submission. Please note:

- Email addresses must belong to a member of your campus community.
- Added Reviewers will be given full access to view, comment, and vote on your form submission.
- At least one email address is required to proceed.

Email

REMOVE REVIEWER

+ ADD ANOTHER REVIEWER

NEXT

Your Review



Latisha Barnes

Your Vote: Approve



Reviewers



Voting Reviewers



Latisha Barnes

Association - Submission





How Do I Submit Proof Of Purchase?

Proof of purchase must **ALWAYS** be submitted with a completed Payment Request Form and/or Travel Expense Statement along with supporting documentation, also called a payment request packet.

Payment & Reimbursement Packets



Reimbursements Packet

- Payment Request Form
- Proof of Payment (receipts, bank statement, invoice, packing slip, receipt/delivery confirmation, artwork proof)
- Cash memo, non-GSU address delivery memo (if needed)
- PIN advertisement and attendance

Non-Employee Packet

- Payment Request Form
- Invoice
- PIN advertisement and attendance

Company Packet

- Payment Request Form
- Invoice, Packing Slip, Receipt/Delivery Confirmation, artwork proof
- W9 or Vendor Add Form, if vendor has never been used before. If one was not provided when Purchase Requested was submitted.
- PIN advertisement and attendance

If packets are not submitted and completed within 30 days from the purchase, a late memo will need to be submitted.

All attendance in PIN must be updated by the next business day.



REGISTERED STUDENT ORGANIZATION PAYMENT REQUEST

Required fields

Purchase Request#

Expense Type (Select a box): Reimbursement Vendor Payment

*Full Name of Club/Organization: _____

*Faculty/Staff Advisor: _____

Is reimbursee a Georgia State University faculty, staff, or student? (If yes, complete only section 1) Yes No

Is reimbursee a U.S. Citizen or Permanent Resident Alien (Green Card Holder)? Yes No

Organizational funds were used for the purchase? (If yes, skip to section 2) Yes No

SECTION 1: REIMBURSEMENT INFORMATION

*Person Being Reimbursed: _____
(Legal Name)

*Address: _____

*Panther ID#: _____

*Email address: _____ *Reimbursement Amount: \$ _____

*Description of Expense: _____

SECTION 2: VENDOR PAYMENT INFORMATION

*Vendor Being Paid: _____ *Invoice Number: _____

*Amount Due to Vendor: \$ _____ *Date of Expense: _____

*Description of Expense: _____

Note: Expenses charged directly through University campus partners, (Panther Dining, PawPrints, Student Center, etc.). Do not require completion of an RSO Funding Reconciliation Form. RSO's faculty or staff advisor signature is NOT required but a thumbs up is needed in the PIN Reconciliation Submission.

Travel Reimbursement



Travel Reimbursements Packet

- Payment Request Form (only for registration reimbursement requests)
- Travel Expense Statement
 - [2025 In State Travel Expense Form](#)
 - [2025 Out of State Travel Expense Form](#)
- Proof of Payment (receipts, bank statement, hotel folio)
- MapQuest/Google Maps directions (for mileage requests)
- Cash memo (if needed)



Travel Summary

Steps to submit summary:

1. Create a news article in PIN. https://blackboard.my.site.com/Support/s/article/360019496052-News-Walkthrough?language=en_US

Copy and save the link created: <https://pin.gsu.edu/news/XXXXXX>.

2. Submit the news post via the PIN: SAF Reconciliation Form
<https://pin.gsu.edu/submitter/form/start/562281> under **Travel Summary**.

[Helpful Document](#)

Only one submission per RSO per travel is required.

Travel Summaries are required for any registration fee funded by SAF funds.

FAQ's



May I have non-GSU Students attend my events for free?

- No, student activity fees are not intended to fund those entities or provide benefits to individuals who are not currently enrolled fee-paying students.

Where can I see RSO's remaining budget balance?

- PIN Financials will show you a balance if you have any questions, please email safsupport@gsu.edu to request a shadow budget.

Are social events funded by SAF?

- No funding may be provided for member-only events, programs, or activities, or those primarily focused on the business of the RSO and/or its members (e.g., general body meetings, membership recognition events, club socials, planning meetings/retreats).

Can a student or RSO get reimbursement without a Purchase Request Pre-Approval being granted before purchase?

- No, all purchases funded by SAF must have preapproval.

Does funding roll over?

- SAFC allocations and outstanding balances do not roll over from year to year to the individual organizations, programs, or departments.

HELPFUL RESOURCES

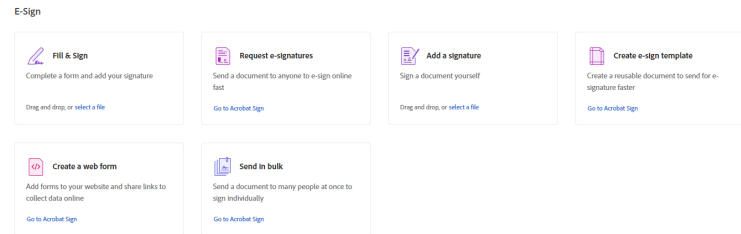
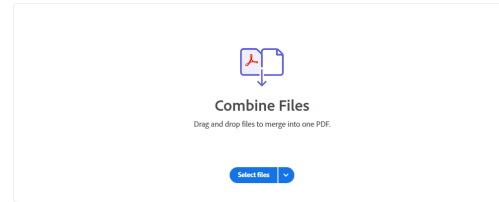


Adobe Acrobat

Click Link: [Adobe Account](#)

- Log in with your GSU Student credentials using a web browser
- Combine files (files do not need to be PDF, but be cautious of how the TES form uploads)
- E-Sign documents
- Send PDF files via e-mail to request signatures.

Login will not work on the app, please use webpage.



HELPFUL RESOURCES cont.



- ❑ How to start an organization bank account: <https://pin.gsu.edu/organization/atlstudentorgs/documents/view/1058122>
- ❑ How to track event activities in PIN: https://www.youtube.com/watch?v=urM36Sc7_oA
(Events functionality starts at time marker 17:47)
- ❑ All RSO Financial Forms can be found here: <https://pin.gsu.edu/actioncenter/organization/saf/documents>
- ❑ YouTube video: How To: Use the PIN Event Check-In App: <https://youtu.be/O3esCVvRe6s>
- ❑ Accessing your PIN Event Pass <https://youtu.be/flb4ysPQjY8>
- ❑ Campus Labs® Event Check-in App Walkthrough
[Campus Labs® Event Check-in App Walkthrough – Engage Help Center](#)
- ❑ How to manage Student Org PIN page: <https://gsu.campuslabs.com/engage/organization/atlstudentorgs/documents/view/1203928>
- ❑ [Click here](#) to schedule a meeting with a member of our team.

Questions can be submitted to Centralized SAF Business Support at safsupport@gsu.edu