



BUDGETS & REIMBURSEMENTS

Campuslife.upstate.edu

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UPSTATE MEDICAL UNIVERSITY | *Campus Life*

HOME EVENTS ORGANIZATIONS NEWS FORMS

Explore SUNY Upstate Medical University

Search Events, Organizations, and News Articles

COVID-19 Tests Available
Tests are available for all Upstate students! Sign up now!

Welcome
Welcome to Engage!
Upstate Student Government is pleased to welcome you to our new student organization management platform! All student org business will be done here!

Training
Stay tune for student organization training with Engage!

Memberships

- Accessible Upstate
- AANS American Association of Neurological Surgeons
- AMA American Medical Association
- AMWA American Medical Women's Association
- APSA American Physician Scientists Association
- Anesthesiology Interest Club
- APAMA Asian Pacific American Medical Students' Association
- Association of Native American Medical Students
- Association of Women Surgeons

Taskbar: Calculator, Chrome, Outlook, Teams, PowerPoint

Profile: 

-  Explore
-  Manage
-  Admin

Organization Access

Click the waffle next to your photo
Choose 'Manage'



Action Center

Manage your organization content and review submissions.

My Memberships

REGISTER

- | | | |
|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
|  Accessible Upstate |  American Association of Neurological Surgeons |  American Medical Association |
|  American Medical Women's Association |  American Physician Scientists Association |  Anesthesiology Interest Club |
|  Asian Pacific American Medical Students' Association |  Association of Native American Medical Students |  Association of Women Surgeons |
|  Behavior Analysis Studies Class of 2022 |  Behavior Analysis Studies Class of 2023 |  Campus Activities Governing Board |
|  Cardiology Club |  Cardiothoracic Surgery Interest Group |  Cardiovascular Perfusion Class of 2022 |

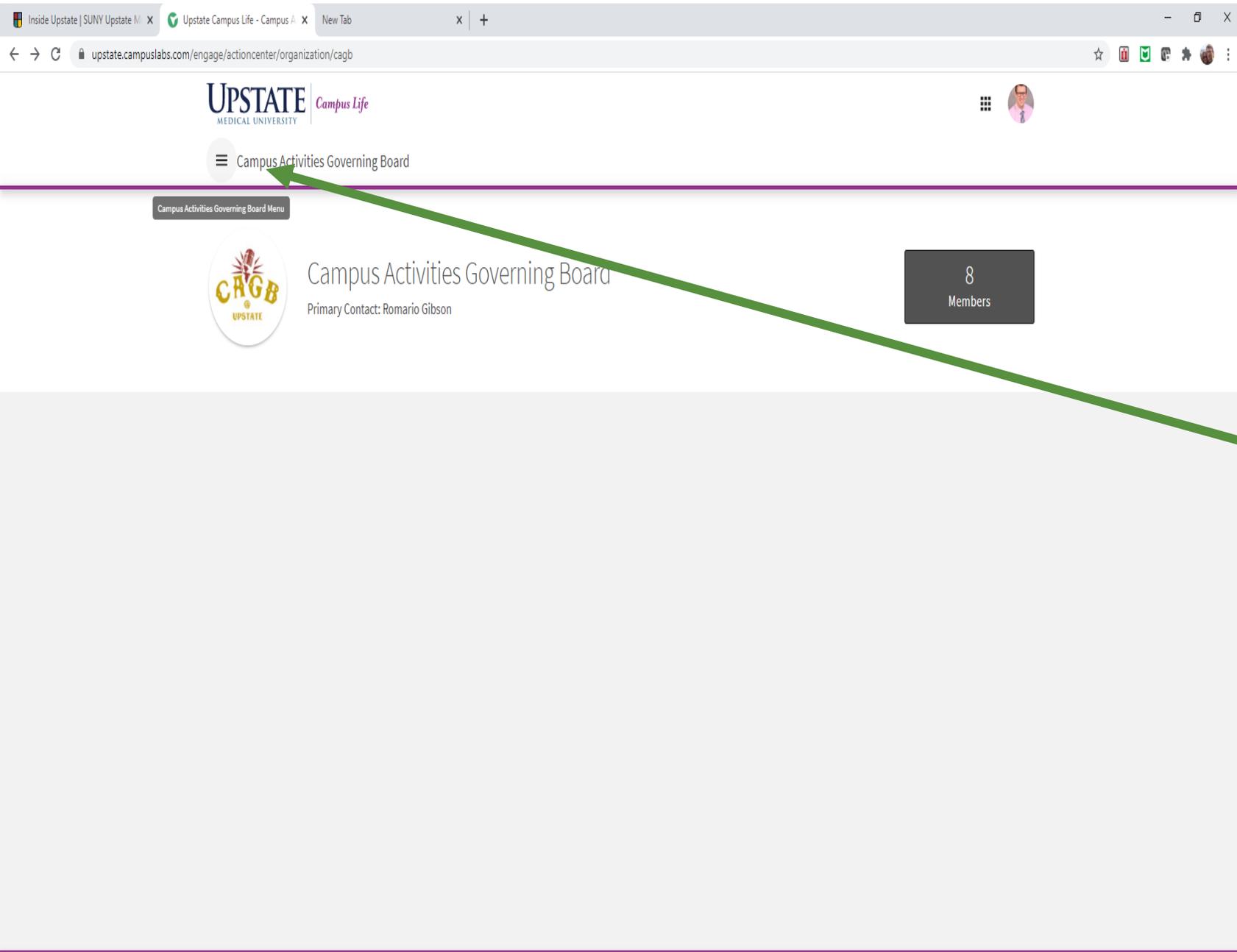
(Showing 1-15 of 94)

SHOW MORE

Select Your Organization

Click on the organization you would like to create the request.

Only organizations where you are a member will appear on this screen



Open the setting menu

Click the 'hamburger' setting menu in the upper left corner next to the organization name

Then choose "Finance"



HELP US IMPROVE THIS PAGE

Purchase Requests

ACCOUNTS CREATE REQUEST

Search

Status All Statuses

Stage All Stages

Category All Categories

Show Only Recently Deleted

All : 3 results Sort by: Submitted Date

Ryan Green Test Three No. 4	Submitted Apr 16, 2021	Status: Completed	Stage: Completed	\$ 45.00
Ryan Green Test Two No. 3	Submitted Apr 8, 2021	Status: Completed	Stage: Completed	\$ 50.00
Ryan Green Test Request No. 1	Submitted Apr 6, 2021	Status: Completed	Stage: Completed	\$ 50.00

All Results Loaded

Finance Summary

This screen will show all finance requests and their status/stage

Choosing the 'Accounts' button will show all accounts associated with this organization and your 'live' balance



Accounts

- All organizations have two accounts
- USG Allocated funds
 - This fund is the amount of money the organization requested the previous spring and was approved to have by USG
 - Any monies not spent in these funds go back to USG at the end of the academic year
- Fundraised Monies
 - These funds are the amount the organization has fundraised
 - This money carries over from year to year
 - Organizations are recommended to have a plan to spend their fundraised monies

Spending Money

- USG Allocated funds may ONLY be utilized for events that were approved through the budget process
- Fundraised monies have more leniency with how they are spent
- Contact the Office of Campus Activities for questions

- No SALES TAX may be reimbursed
 - Tax exempt forms are available at the CAB Info Center
 - Any money spent on sales taxes will NOT be reimbursed for the sales tax portion

- Per USG Policy only up to \$10 gratuity for deliveries or pick-ups, regardless of amount of order



Create Purchase Request

Request Details

*Subject

Description

*Requested Amount

*Categories

*Account

Payee Information

First Name

Last Name

Create Purchase Request

This is where members are reimbursed for spending funds

Subject Name of event or meeting

Description include the details of what funds were spent on for the event or meeting

Category Type of purchase

Account Select the correct account

*Requested Amount

*Categories

*Account

Payee Information

First Name

Last Name

Street

Street Continued (Optional)

City

State/Province

ZIP/Postal Code

Additional Information

Payee Information

Payee the person being reimbursed

Additional Information

Choose if the check is mailed or picked up at the Bursar Office

* Will the check be picked up or mailed?

Picked up at the Bursar's Office CAB room 200.

Mail to payee address listed

Upload the itemized receipt or invoice. Will be required for payment.

UPLOAD FILE

Additional itemized receipt upload as needed.

UPLOAD FILE

Additional itemized receipt upload as needed.

UPLOAD FILE

SUBMIT REQUEST

CANCEL

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Receipts

Upload receipts – required for reimbursement

Itemized An itemized receipt show the items purchased must be included - i.e. at a restaurant, must show what food was purchased AND include credit card receipt showing proof of purchase

Submit Request

Once the request is submitted the funds are 'encumbered' for the organization until the request is approved or denied

- Encumbered means the funds are on hold so the organization does not accidentally over spend the funds.
- Any encumbered funds will be shown on the account screen as the balance and the 'available balance' may be different.

Approval Process

- When any member of the organization submits the request an email will automatically go to the treasurer for approval, then to the president for approval. Once both officers approve the request it will go to the Office of Campus Activities for processing
- Checks may take up to a week to process AFTER it is approved by the treasurer and president

Checks

- Students will receive an email for any checks requested to be picked up at the Bursar's Office
- Checks requested to be mailed will be automatically sent once the reimbursement is processed

Invoices

- The procedure is the same for any invoices to be processed

Questions

- All questions, contact the Office of Campus Activities
 - CAB room 202
 - campact@upstate.edu
 - 315.464.5618
- Please see the additional training document regarding what USG funds can be utilized for versus fundraised monies