SU FINANCIAL GUIDELINES

FALL 2020
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GENERAL REMARKS

Welcome! This is your guide to navigating Student Union as a student group! We are here to serve and support you as you pursue your passions, brighten your communities, and exercise your many talents. Our goal is to make sure you have all the relevant information and resources so you can continue to do what you do best.

As COVID-19 continues to impact our lives and the role of student groups in the upcoming semester, we have outlined the most relevant guidelines and resources in this document. Programming restrictions are largely based on University guidelines, but additional relevant information will be sent out by SU throughout the semester.

If you have any questions about anything in this document or about SU in general, please feel free to reference the relevant contacts section. We are looking forward to this upcoming year and all of the exciting things you will accomplish.

Best,

Ranen Miao                    Alexa Jochims
Student Union President         Vice President of Finance
Dear WashU Students,

As many of you are accustomed to hearing by now, this is a tumultuous time for many institutions. This semester, student programming will look different than usual. While we work together to combat the spread of the coronavirus, we pledge to continue to find ways to support student groups through this time and look towards a future where we can return to student programming with renewed enthusiasm and improved methods. Never hesitate to reach out if you have any questions, as I, and the rest of the Financial Leadership team, will always be available to answer.

Notable changes include but are not limited to:
• 90% rule: Due to the continuation of COVID-19 and the implementation of longer-term financial changes, the 90% rule has officially been eliminated.
• Enterprise Carshare: Due to COVID-19, the Enterprise Carshare program has been indefinitely suspended and all subsequent policies will be inapplicable for the near future.

If you have any questions regarding this manual, any of our updates, or your specific budget, please do not hesitate to reach out to me at budget@su.wustl.edu.

Sincerely,
Fadel Alkilani
Budget Committee Chair Fall 2020
RELEVANT CONTACTS & THEIR ROLES

SU Executive Board:

Click Here to Meet the Members of the Executive Board

Ranen Miao, President: president@su.wustl.edu
Talk to him about SU’s long-term plans and general inquiries

Anne He, Executive Vice President: executive@su.wustl.edu
Talk to her about internal SU policies or SU entities

Alexa Jochims, Vice President of Finance: finance@su.wustl.edu
Talk to her about budgets, Executive Appeals, and financial policies

Arjan Kalra, Vice President of Engagement: engagement@su.wustl.edu
Talk to him about SU resources, advertising/marketing, and engaging various parts of the Student Body.

Charlotte Pohl, Vice President of Programming: programming@su.wustl.edu
Talk to her about general programming advice and the Social Programming Board

Treasury:

Click Here to Meet the Members of Treasury Leadership

Zachary Sorenson, Speaker of the Treasury: treasury@su.wustl.edu
Talk to him about Student Union Treasury and how your student group can appeal for money.

Fadel Alkilani, Budget Committee Chair: budget@su.wustl.edu
Talk to him about student group budgeting and your student group’s budget

Zoe Hancock, Activities Committee Chair: activities@su.wustl.edu
Talk to her about your new group’s application and changing categories
Fall 2020 Budget Committee Members:

Budget Committee gathers each semester under the guidance of the Budget Committee Chair to finalize the budgets of Category 1 and Category 2 student groups according to the designated funding caps.

BAT 1: bat1@su.wustl.edu
BAT 2: bat2@su.wustl.edu
BAT 3: bat3@su.wustl.edu
BAT 4: bat4@su.wustl.edu
BAT 5: bat5@su.wustl.edu
BAT 6: bat6@su.wustl.edu
BAT 7: bat7@su.wustl.edu
Professional Staff:

Janice Davidse, SU Business Manager - Campus Life:  
Janice.davidse@wustl.edu, 314-935-5911 Office 251A in Ste 250/270 Campus Life DUC  
Talk to her about SU Finances and policies, student group support and how to get involved.  
Click here to schedule an appointment with Janice

Cathy Winter, SU Business Coordinator - Campus Life:  
Catherine.winter@wustl.edu, 314-935-7584 Office 257 in Ste 250/270 Campus Life DUC  
Talk to her about student group financial transactions.  
Click here to schedule an appointment with Cathy

Katie Chandler, SU Business Coordinator - Campus Life  
Katie.chandler@wustl.edu, 314-935-8217 Office 257 in Ste 250/270 Campus Life DUC  
Talk to her about student group financial transactions.  
Click here to schedule an appointment with Katie

Peggy Hermes, Asst Director – Campus Life:  
Peggy.dixon@wustl.edu, 314-935-3962 Office 254 in Ste 250/270 Campus Life DUC  
Talk to her about WUGO, GPS advising and training, general student group support and Campus Life policies.  
Click here to schedule an appointment with Peggy

Will Atchinson, SU Technology Specialist – Campus Life:  
Will.atchinson@wustl.edu, 314-935-3936 Office 251B in Ste 250/270 Campus Life DUC  
Talk with him about WUGO access, SU hardware, software licensing, or website feature requests.  
Click here to schedule an appointment with Will

Beth Doores, Assoc Director - Campus Life:  
Ejdoores@wustl.edu, 314-935-4971 Office 255 in Ste 250/270 Campus Life DUC  
Talk to her about getting involved on campus, finding the right group for you, general Campus Life resources and connections.  
Click here to schedule an appointment with Beth

Kyra Johnston, Event Coordinator - Campus Life:  
kyra.johnston@wustl.edu, 314-640-7595 Office 160 A in Ste 160 Campus Life DUC  
Talk to her about event registration, programming, and Campus Life policies.  
Click here to schedule an appointment with Kyra
ROLE OF STUDENT GROUPS

The President, Treasurer and Members should become knowledgeable about and utilize resources containing procedures, rules, and policies in order for the group to function together:

- SU Financial Guidelines
- SU Finance website - sufinance.wustl.edu
- Student Union website – su.wustl.edu
- Campus Life website – students.wustl.edu/campus-life/

There can only be one President and one Treasurer registered as group leaders through WUGO: Washington University Student Group Organizer, but a group can operate with co-presidents and co-treasurers.

The student group Treasurer is accountable for adherence to procedures, rules, and policies, maintaining the balance of the student group’s account, approving, tracking and submitting all financial transactions in SU Finance.
TYPES OF STUDENT GROUP ACCOUNTS

For the Fall of 2020, Student Union (SU) will allocate funds into only the appeals account. In addition, student groups have access to a fundraising and gift account, which are not funded by SU.

WUGO Event Registration Instructions

To access any funding from your student group account, all University programming guidelines must be followed. Student Union will not make any payment without the approval from the WUGO event registration process.

Appeals Account
Funds are allocated by SU and used to support specific items, events or speakers as additional funding not received through semester budgets.

Any unused funds are retrieved at the end of each semester. If this account is overdrawn, the deficit is covered with available funds in the fundraising or gifts account.

Click Here to See How To Access Your Student Group Appeals on pg 8

Fundraising Account
Funds in this account come from money sources other than an SU allocation. Any unused funds will automatically carryforward without a submitted request form.

Gift Account
Funds in this account are generated by a student group through gifts or donations received from outside organizations, companies or individuals.

Funds in the fundraising and gift accounts are not subject to the same restrictions as SU allocated funds. However, despite the more flexible restrictions, some expenditures are subject to review by the Vice President of Finance and/or SU professional staff.

Important Dates for Your Accounts

Important Dates for Student Groups:

- New Group Recognition and Category Change Application Due: September 25th
- Last day to use SU VISA: December 11th
- Last day to program: December 13th
- Last day to submit request forms: December 15th
- Last day to request a Carry-forward: December 15th

You can access your accounts through the following dates:

- Fall Semester: September 14th - December 15th
- Spring Semester: January 25th – May 9th
- Summer: May 9th – June 15th
- No access to accounts from June 16th – July 15th
STUDENT GROUP SOURCES OF FUNDING

Appealing

In light of the University’s fall programming restrictions and projected minimal on-campus activity due to the continuation of COVID-19, Student Union will have a dramatically reduced budget for the semester. Our allocation toward student group programming is subsequently also far more limited. To account for these changes, SU’s Financial Leadership team has outlined both the fall appealing process and tangential policies to provide student groups with the funding they want or need, while also recognizing that our funding is limited and approximately 350 groups could request funding this fall. The appeals fund is allocated on a first-come, first-serve basis.

Category Funding Limits
Student groups will not receive SU funds in their Operating accounts in the fall semester, we will be applying overall appealing limits for all groups instead. These funding limits will parallel the standard category-based funding limits.

- **Category I groups**: No upper limit
- **Category II groups**: Up to $500
- **Category III groups**: Up to $350
- **Category IV groups**: Up to $75
- **Category V groups**: No funding from Student Union

Appealing Limitations

In an effort to maintain the student group appeals account for the entirety of the fall semester, Student Union has implemented the following funding limitations.

Number of Appeals
- If a student group is planning on appealing for more than one event, each event must be submitted separately and will be reviewed as separate appeals.
- Treasury will approve **up to three** appeals that are over $1,000
- Treasury and the Vice President of Finance collectively will approve **up to five** appeals total (this includes both under $1,000 appeals and over $1,000 appeals)

Appeals that will not be seen
- Any funding request for an event that violates Campus Life’s fall programming policies (including off-campus programming, travel, and in-person programming exceeding 25 people)
- Food or materials for General Body Meetings or Information Sessions
- Coaching fees
- Apparel
- Equipment
- Expenses for the spring semester
- **Speakers / performers with honoraria exceeding $5,000**
Appealing Process

1. Apply for Campus Life Programming approval through WUGO
2. If Campus Life approves the event request, the student group can appeal to Student Union for funding. The programming application will appear in the funding request to provide SU with the necessary information relating to the event.

Appeals below $1,000
Similar to normal practices, appeals under $1,000 will be seen by the Vice President of Finance. The Vice President Finance will review the appeal and reach back out to the group with any outstanding questions or concerns. There will be an expected two-week turnaround time. If you have any questions relating to an appeal below $1,000, please reach out to the Vice President of Finance.

Appeals above $1,000
Similar to normal practices, appeals over $1,000 will be seen by Treasury. Once the appeal is submitted, the Speaker of the Treasury will schedule the group to present their appeal to Treasury during Tuesday night weekly meetings. This is the only time during which an appeal could be approved by Treasury. Depending on the number of appeals on the docket, there should be a 1-2 week turnaround time for Treasury to see the appeal. Please be aware that the Treasury docket fills quickly, so plan ahead and submit your appeal as early as possible. If you have any questions relating to an appeal above $1,000, please reach out to the Speaker of the Treasury.

The appeal will be presented to Treasury in a virtual setting in a 3-5 minute time frame. The appeal should present key information:
- The event name
- The event description
- The number of attendees
- An explanation of each line item.

The Speaker of the Treasury and/or two Treasury representatives will meet with the group by Zoom or phone to discuss the presentation and answer any questions prior to the session.

Following the presentation, the session will move into Q&A, where Treasury representatives can ask any remaining informational questions. Following Q&A, the session will move into discussion, where Treasury representatives will discuss the appeal and the line items that can be funded.
Miscellaneous Appeals Information

If a student group is appealing for a speaker, a contract between the University and the speaker is required. Please be aware that no student can commit to or sign any contracts before the event’s funding is approved. Once the Appeal has been funded, the student group must meet with their Campus Life GPS Advisor to work on the contract process. This is required to finalize an agreement with the vendor and to make a payment to the vendor.

Student Union will not reimburse students for expenses incurred before funding is approved. Please do not spend personal funds on items unless an appeal for the specific event has been approved. If you choose to spend money on an appeal event without Student Union approval, you will not be reimbursed. Only spend money on funds that have been approved by the Treasury or the Vice President of Finance.

If you have any questions about this policy, please reach out to the VP of Finance or your student group’s SU Business Coordinator. If you have any questions or need help in writing an appeal, you can email the Vice President of Finance or the Speaker of the Treasury to set up a meeting or receive guidance on appealing for funds.

Appealing - Executive Appeals

The Executive Appeals account is controlled by the Vice President of Finance and Executive Council. Any appeal $1,000 and above submitted by SU Entities will be directed to the Executive Council. Appeals below $1,000 will go directly to the Vice President of Finance. Appeals can be submitted for entities that desire additional funding other than what has been obtained during the General Budget process. There is no limit for the number of appeals an entity may submit, however all groups are limited to three approved appeals per semester. Unutilized approved appeals do not carry over to the following semester. Exemptions are limited to the discretion of the Vice President of Finance. If a student group is submitting more than one event, each will be counted as an individual appeal. Student groups are not allowed to appeal for the same event or expense more than once.

It is recommended to submit an appeal at least three weeks in advance and will be seen on a first-come-first-serve basis. All appeals must be in compliance with Student Union policies. To submit an appeal, please contact the Vice President of Finance and fill out the online form on SU Finance by clicking “Submit and Appeal”.

Financial Transactions

Accepting the role of Treasurer for your Student Group can be overwhelming. There are so many rules! Luckily, there is no need to memorize all the details. This guide has been created to help the Treasurers become successful and comfortable in this position throughout the entire year. The Business Coordinators are available virtually to support you. Click here to watch a short introduction video.

**BUSINESS COORDINATOR ROLE**

- Available to discuss financial transactions with assigned student groups
- Answer financial spending questions
- Work by appointments for general financial consultations that are not budget related
- Process all financial transactions
- Ensure policies are being followed

8:30 AM - 5:00 PM
MONDAY - FRIDAY
BOOKING AN APPOINTMENT

1. BUSINESS COORDINATORS
   Student groups can set up a virtual appointment with their assigned Business Coordinator for:
   1. Financial transactions help or questions
   2. General consultations that are not Budget/Appeals related

2. APPOINTMENTS
   Can be booked 14 days in advance through SUFinance on the portal page

3. TYPE OF APPOINTMENT
   1. General Consultation - 15 minutes
   2. General Consultation - 30 minutes

4. SELECT DATE & TIME
   This is based on central time

5. PROVIDE INFORMATION
   It is important to be detailed in the reason for the meeting so that the Business Coordinator can be prepared

6. ZOOM
   Student group and Business Coordinator meet
Spending Process

Non-Event Related Purchase

START

Submit an Appeal in SUFinance

Did the Appeal get approved?

NO

Does student group have Fundraising or Gift account?

NO

STOP

There can be no spending

YES

Proceed to SUFinance to submit request form

YES

Did the Business Coordinator approve or reject the request?

REJECT

Fix issue and re-submit request

APPROVE

Business Coordinator will process the request

END
1. **Student Union Financial System**

2. **View Financial Related Communication**
   - Find important dates and deadlines on the portal page.

3. **Schedule Appointments**

4. **File Appeals**

5. **Submit Request Forms**
   - Check on status of pending requests.

6. **Track Spending**
   - Track Spending is a way of keeping a record of the student group financial activity for anyone to view. Use the Fiscal Year drop-down box to view current and previous fiscal year group activity.
This is the student group allocation from Student Union

SU credit card requests

Paid or invoiced interdepartmental orders

Deposits from a credit card machine - not available this Fall

Entry made by staff when a check is canceled

Entry made by staff when a canceled check is re-issued

IF A LIVE CHECK WAS NEVER DEPOSITED OR CASHED AFTER 6 MONTHS, THE UNIVERSITY AUTOMATICALLY STOPS PAYMENT ON THE CHECK. THIS IS CALLED A CANCELED CHECK. IF THIS HAPPENS, AN ENTRY WILL BE DONE IN TRACK SPENDING THAT ADDS THE MONEY BACK INTO THE STUDENT GROUP ACCOUNT.

DO NOT SPEND THAT MONEY, THE STUDENT GROUP DOESN'T NEED TO DO ANYTHING - THE BUSINESS COORDINATORS WORK BEHIND THE SCENES TO REACH OUT TO THE INDIVIDUALS TO GET A CURRENT ADDRESS SO THAT THE CHECK CAN BE ISSUED TO THEM. THIS MEANS THE MONEY COMES BACK OUT OF YOUR ACCOUNT - THIS IS WHY YOU DON'T SPEND THE MONEY. IF THE BUSINESS COORDINATORS NEVER RECEIVE A RESPONSE, AFTER A CERTAIN AMOUNT OF TIME, THEN THE MONEY IS SENT TO THE STATE OF MISSOURI AS UNCLAIMED PROPERTY.
**TRACK SPENDING TERMINOLOGY**

**Transaction Date**
The day when items were posted to the accounts in Track Spending.

**Doc #**
Document number assigned in the WashU accounting system and the SUFinance request form transaction #.

**Vendor/Person**
Who is receiving the money.

**Event**
SU allocation or a created event via a group re-allocation.

**Expense Description**
Who, what, where, why of the entry for record keeping and Budget Committee review.

**Expense**
Money leaving the account.

**Deposit**
Money entering the account.

**Current Balance**
This is the Track Spending balance only - doesn’t include pending requests.

**Available Balance**
This is the Track Spending balance AND all pending requests that haven’t posted.
TYPES OF REQUESTS

CHECK
A check request document type is used to pay vendors directly if they don’t accept credit card payments and to reimburse individuals for out of pocket student group related expenses - the person who is out of pocket should be the person being reimbursed.

SU VISA
A credit card that student groups have access to for making purchases - this semester there will be no in person credit card purchases allowed.

SAM’S CLUB
A tax free business account that allows student groups to place orders and pick up at the Maplewood club.

AMAZON
A tax free business account that allows student groups to place orders and have prime delivery - because of COVID-19, orders can be shipped to an address outside of the Campus Life office.

PAYING ID
Interdepartmental invoices (IDI) allow a WashU department to charge another WashU department for goods or services.

INVOICING ID
WashU departments might provide money to student groups as another source of funding. Student Union groups can also transfer funds between each other.

DEPOSITS
When a student group receives or collects money from an event, program, fundraiser, dues, memberships or donations, the money must be deposited into one of the student group accounts.
HOW TO FILL OUT A REQUEST FORM

Check Requests

SELECT THE EVENT OR PURPOSE
- Using the drop down box, choose what is automatically filled in from the Appeal or Create an Event
- Enter the actual date of event relative to the purchase
- Non-event purchases use the date of purchase
- Contact email should auto fill

SELECT THE STUDENT GROUP
Filling out the request form using the drop down box

SELECT REQUEST TYPE
Check Request

SPECIAL MAILING INSTRUCTIONS
This feature will not be used this fall semester

DESCRIPTION
Enter helpful details of the request such as who, what, where and why. This field will show up in Track Spending once the request is posted

CREATE THIS REQUEST

TRAVEL
This feature will not be used this fall semester

PAYEE ID TYPE
- Student/Staff ID # - this is used for payments made to students or employees of the University
- Social Security # - this is used when paying an individual outside of the University
- Federal ID # - this is used when paying a company outside of the University

NUMBER OF PARTICIPANTS
This is only relevant to events – enter the anticipated number of people in attendance

NAME & MAILING ADDRESS
- Enter name of vendor/individual receiving money
- If the treasurer is being reimbursed, check the box to remove the approval feature from treasurer and forwarded to the president
- Please use the mailing address box for ALL addresses
  - Campus mail - add street address, MSC number and zip code - this ensures a timely payment

PAYMENT INFORMATION
- Fill in amounts next to the account where the expense will be debited
- Multiple accounts debited can be done on the same request
- When the expense box is checked, the system debits the payment

UPLOADING SUPPORTING DOCUMENTS
- Check file - DO NOT upload contracts
- Upload receipt image - if there are multiple receipts reimbursing the same individual for the same event, then only one request form is necessary
- Image will attach
- Review the attachment for legibility
- No need to submit any original receipts once submitted electronically
- Save original receipts until the payment is posted in the processing stream

SAVE OR SUBMIT REQUEST
- Saved requests (unsubmitted) do not appear in the business coordinators processing stream
- Submitted requests do appear in the processing stream
- Rejected requests go from the submitted to unsubmitted status
- Requests processed in the order in which they are received in the submitted status
**CHECK REQUESTS**

1. **Submit Request Form**
   Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance. Check request forms must be submitted within 14 days of purchase for reimbursement.

2. **Business Coordinator Review**
   The business coordinator will approve or reject the request. Allow 7 business days to review.

3. **Business Coordinator Processes**
   The business coordinator enters the payment or reimbursement into the Accounting System.

4. **Request Rejected**
   If request is rejected, the student group addresses the issues and re-submits request for review.

5. **Other Departments Approval**
   Once the request is in the Accounting System, other departments are pulled into the approval process.

6. **Check Cut**
   Once all approvals are done, the check processes overnight. A paper check is mailed or an electronic payment is sent.

*PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.*
Receipt Examples

RECEIPT - Entire receipt should be uploaded to request as documentation with pertinent information. Only pdf and jpeg images can be uploaded to request form.

where

what

proof of payment - if receipt was paid for in cash but the receipt doesn’t state that, then add “paid cash” in the description area of the request form

when

RECEIPT - A credit card statement doesn’t replace a receipt - it should only be used in addition to a receipt to show proof of payment if not reflected on the receipt. If uploading a credit card statement or a payment made by check, black out any sensitive information such as account number and the actual credit card number.
Documentation Example

DOCUMENTATION - If a group wants to make a donation to an organization, supporting documentation is a letter of intent. The document required should be on the charity's letterhead and contain the dollar amount that is being committed. Charities are familiar with issuing such documentation.

[Image of a letter from the Federation of Organizations]

November 13, 2013

Mr. James T. Powers, ALA
President, Board of Directors
The Townwide Fund
PO Box 384
Huntington, NY 11743

Dear Mr. Powers and Board Members,

I would like to take this opportunity to thank The Townwide Fund of Huntington, Inc. for their generous donation of $4,000 to be used to continue the Foster Grandparent Program in Huntington.

We appreciate your support of our seniors who work so diligently to better our community, and we are pleased to know that you value their work.

Sincerely,

Barbara Faron
Chief Executive Officer

[Signature]

This gift is tax deductible as the exemption allowed by law. The value of goods and services received is $0.
PATH OF A CHECK REQUEST

1. BUSINESS COORDINATOR
   Enters the request into the University accounting system

2. ROUTING
   The check request could route to other departments in the University for their approval first:
   1. Vendor Assignment - if payee hasn’t ever been paid by the University
   2. Tax Department - if there are any tax related issues

3. STUDENT UNION BUSINESS MANAGER
   The business manager must approve electronically.

4. ACCOUNTS PAYABLE
   Electronic approval is required - the last set of approvals

5. PAYMENT IS MADE
   A paper check is cut and mailed
   Electronic payment for University employee
HOW TO FILL OUT A REQUEST FORM
SU Credit Card

SELECT THE EVENT OR PURPOSE
- Using the drop down box, choose what is automatically filled in from the Appeal or Create the Event
- Enter the actual date of event relative to the purchase
- Non-event purchases use the date of purchase
- Contact email should auto fill

SELECT THE STUDENT GROUP
Filling out the request form using the drop down box

DESCRIPTION
Enter helpful details of the request such as who, what, where and why. This field will show up in Track Spending once the request is posted

CREATE THIS REQUEST

TRAVEL
This feature will not be used this fall semester

PAYEE ID TYPE
Payment/Company - this is used on credit card requests for name of vendor/company receiving the payment

NUMBER OF PARTICIPANTS
This is only relevant to events - enter the anticipated number of people in attendance

NAME & PHONE NUMBER
- SU Visa - Enter name of vendor/company receiving money
- enter phone number if this is a phone order
- Sam's Club - auto fills

PAYMENT INFORMATION
- Fill in amounts next to the account where the expense will be debited - if the exact amount is unknown, then estimate
- Multiple accounts debited can be done on the same request
- When the expense box is checked, the system debits the payment

UPLOADING SUPPORTING DOCUMENTS
- Choose file - invoices to be paid or the Sam's order needing to be placed
- Upload Image
- Image will attach
- Review the attachment for legibility

SAVE OR SUBMIT REQUEST
- Saved requests (unsent/bad) do not appear in the Business Coordinator's processing stream
- Submitted requests do appear in the processing stream
- Rejected requests go from the submitted to unsent status
- Requests processed in the order in which they are received in the submitted status
SU VISA

1. **SUBMIT REQUEST FORM**

Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance. A reasonable estimated amount can be used if the exact dollar amount is unknown.

2. **BUSINESS COORDINATOR REVIEW**

The business coordinator will approve or reject the request. Allow 2 business days to review. The reviewing is done in submission date order.

3. **SU VISA APPROVED**

If request is approved, the business coordinator will make the payment. The business coordinator will not be placing phone or Internet orders.

4. **ORDER REJECTED**

If request is rejected, the student group addresses the issues and re-submits request for review.

5. **UPLOAD RECEIPT**

The business coordinator is responsible for getting the receipt and uploading it to the request form in SUFinance.

Please refer to the Student Group Rules, Restrictions and Policies section of this guide. Student groups are held accountable for compliance.
1. **SUBMIT REQUEST FORM**

Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance.

2. **BUSINESS COORDINATOR REVIEW**

The business coordinator will approve or reject the request in SUFinance. Allow 2 business days to review. The reviewing is done in submission date order.

3. **ORDER APPROVED**

If request is approved, the business coordinator places the Amazon order through the tax free, Prime, Amazon Business account.

4. **ORDER REJECTED**

If request is rejected, the student group addresses the issues and re-submits request for review.

5. **AMAZON ORDER DELIVERED**

Student group receives the order and Business Coordinator will upload the receipt to the request form from the Business account.

PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.
Amazon Order Example

The student group order must be uploaded as documentation in the Amazon request form. The item links must be clickable.

3 Bodycology Pure White Gardenia Foaming Body Wash (1 Unit), 16 Ounces
Need by: (8.31.20)
crid=3MONQLSA49UCE&cv_ct_cx=bodycology+pure+white+gardenia&dchild=1&keywords=bodycology+pure+white+gardenia&pd_rd_i=B0089BB7DQ&pd_rd_r=85c5f7ca-515c-4fc1-b853-e23c1e16a106&pd_rd_w=MtFg&pd_rd_wg=ErQhE&pf_rd_p=13bf9bc7-d68d-44c3-9d2e-647020f56802&pf_rd_r=WHV8TM2514SFJX1BFRZ&psc=1&qid=1596750271&sprefix=bodycol%2Caps%2C187&sr=1-1-791c2399-d602-4248-afbb-8a79de2d236f

1 Touchless Thermometer-Forehead Thermometer with Fever Alarm and Memory Function – Ideal for Babies, Infants, Children, Adults, Indoor, and Outdoor Use
Need by: (8.25.20)
https://www.amazon.com/gp/product/B0824XNJSW/ref=ppx_yo_dt_b_asin_title_o00_s00?ie=UTF8&psc=1

2 Charmin Ultra Soft Cushiony Touch Toilet Paper, 24 Family Mega Rolls = 123 Regular Rolls
Need by: (9.5.20)
https://www.amazon.com/gp/product/B0798DVT68/ref=ppx_yo_dt_b_asin_title_o02_s02?ie=UTF8&psc=1

4 Lysol Disinfecting Wipes, Lemon and Lime Blossom Scent, Kills Viruses and Bacteria, 4 Tubs, 35 Count Each (Total 140 Wipes)
Need by: (8.30.20)
https://www.amazon.com/Lysol-Disinfecting-Blossom-Viruses-Bacteria/dp/B085S7BFW3/ref=sr_1_18?
dchild=1&keywords=lysol+wipes&qid=1596750744&s=hpc&sr=1-18

Provide delivery address: 123 Anywhere Street St Louis, MO 63130
1 SUBMIT REQUEST FORM
Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance.

2 BUSINESS COORDINATOR REVIEW
The business coordinator will approve or reject the request. Allow 2 business days to review. The reviewing is done in submission date order.

3 ORDER APPROVED
If request is approved, the business coordinator places the Sam’s order through the tax free business account.

4 ORDER REJECTED
If request is rejected, the student group addresses the issues and re-submits request for review.

5 PICK UP SAM’S ORDER
Student group picks up order at the Sam’s in Maplewood upon notification.

PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS, AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.
The student group order must be uploaded as documentation in the Sam's Club request form. Orders can only be placed 5 days out of pick up date and never on the same day of pick up. Please order "Pick Up in Club" items only.

3 Softsoap Liquid Hand Soap Decor VarietyPack (13 oz., 4 pk.)  
Item # 980250651 $9.98

1 Non-Contact Infrared Thermometer  
Item #980286291 $38.98

1 Charmin Ultra Soft Toilet Paper 32 SuperPlus Roll, 218 Sheets Per Roll  
Item #980254538 $22.98

2 Clorox Disinfecting Wipes Value Pack,Bleach Free Cleaning Wipes (85 per pk., 5 pk.)  
Item # 980249214 $14.98

Pick Up: Friday, Sept 4 between 10 am - 2pm

Andrew Martin Cell: 314.123.4567

Email: DrewMartin@wustl.edu
HOW TO FILL OUT A REQUEST FORM
Interdepartmental Orders

1. SELECT THE STUDENT GROUP
   - Filling out the request form using the drop-down box
   - When transferring money between student groups, the student group sending the money should fill out the request form

2. SELECT THE EVENT OR PURPOSE
   - Using the drop-down box, choose what is automatically filled in from the Appeal or Create an Event
   - Enter the actual date of event relative to the purchase
   - Non-event purchases use the date of purchase
   - Contact email should auto fill

3. RECEIVING PAYMENT
   - Must include the name of the department the student group is paying
   - If student group is billing a department, then use the drop-down box to select the student group name

4. MAKING PAYMENT
   - Select the student group name using the drop-down box
   - If student group is billing a department, then include the name of the department and the department billing number

5. DESCRIPTION
   - Enter details like the contact name of the individual committing the funds and a description of how the funds will be used

6. PAYMENT INFORMATION
   - Fill in amounts next to the account where the expense will be debited
   - Multiple accounts debited can be done on the same request
   - When the expense box is checked, the system debits the payment

7. UPLOAD SUPPORTING DOCUMENTATION
   - There is nothing to upload on Interdepartmental Order requests - skip this step

8. SAVE OR SUBMIT REQUEST
   - Saved requests (unsubmitted) do not appear in the Business Coordinator's processing stream
   - Submitted requests do appear in the processing stream
   - Rejected requests go from the submitted to unsubmitted status
   - Requests processed in the order in which they are received in the submitted stage
PAYING INTERDEPARTMENTAL ORDERS (ID)

1. **WUGO EVENT APPROVAL**
   - Register event in WUGO. If there is a cost associated with the event, it must be entered into SUFinance. Costs could include space rental or custodian services.

2. **BILLING NUMBER**
   - When the student group is being billed by another department, the student group must provide the department with the SU billing number 005925 and the student group name.

3. **SUBMIT REQUEST FORM**
   - Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance.

4. **DEPARTMENT BILLS**
   - After the event, the department will send SU an interdepartmental invoice to pay immediately.

5. **BUSINESS COORDINATORS**
   - Receive the ID, match it up with the student group request in SUFinance, pay it and post it to your account in Track Spending.

*PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.*
INVOICING
INTERDEPARTMENTAL
ORDERS (ID)

1. BILLING NUMBER
When a student group is invoicing a department for funds, the student group must ask for the department billing number and department contact name.

2. SUBMIT REQUEST FORM
Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance.

When transferring money between student groups, the student group sending the money should fill out the request form.

3. BUSINESS COORDINATORS
Process the request by sending an electronic invoice to the department.

4. DEPARTMENT PAYS
The department pays the invoice at their convenience.

5. BUSINESS COORDINATORS
Receive the payment and post it to your account in Track Spending.

6. ACKNOWLEDGE
Student group thanks the department for providing another source of funding.

PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.
HOW TO FILL OUT A REQUEST FORM

1. SELECT THE STUDENT GROUP
   Filling out the request form using the drop down box

2. SELECT THE EVENT OR PURPOSE
   - Create the event
   - Enter the actual date of event relative to the deposit
   - Non-event deposits use the date of deposit
   - Contact email should auto fill

3. SELECT REQUEST TYPE
   Deposit Voucher

4. DEPOSIT VOUCHER
   - Use the drop down box under Deposit Type to select from the different types
   - Under Description enter helpful details of the deposit because this field will show up in Track Spending once request is posted
   - Enter the Amount
   - Use the drop down box under Account and select the correct account - if the check is from a donation, select the Gift account

5. CREATE THIS REQUEST

6. PAYMENT INFORMATION
   - The amount auto fills into the accounts
   - The expense box is unchecked which adds the money into the account

7. UPLOAD SUPPORTING DOCUMENTATION
   There is nothing to upload on deposit requests - skip this step

8. SAVE OR SUBMIT REQUEST
   - Saved requests (unsent) do not appear in the Business Coordinators processing stream
   - Submitted requests do appear in the processing stream
   - Repeated requests go from the submitted to unsubmitted status
   - Requests processed in the order in which they are received in the submitted status

9. PLEASE NOTE - TO RECEIVE GIFT/DONATIONS VIA CREDIT CARD
   - Instruct the donor to go the Washington University on-line giving website: gifts.wustl.edu
   - Under "I prefer to enter my own designation" (specify below) enter the name of the student group
DEPOSITS
(Receiving money)

1. COLLECTING MONEY
   No cash or coins can be collected this Fall semester. Only checks that the student group receives can be deposited into a student group account in SUFinance.

2. SUBMIT REQUEST FORM
   Anyone in the student group can fill out a form electronically in SUFinance. The Treasurer of the student group submits the form after reviewing the information for accuracy and policy compliance.

3. PREPARE FOR CAMPUS MAIL
   Any checks that were received as a donation or gift, note that on check - these checks are processed differently by staff.
   1. Put checks in envelope
   2. Include the SUFinance request ID # and student group name

4. CAMPUS MAIL
   Checks should be put in an envelope and sent through campus mail. Go to any of the Mail Services locations - North Campus, South 40 or Village mail rooms.
   1. Ask for an inter-office envelope
   2. Address it to Steve Hendel, MSC 1043
   3. Put the checks into the envelope

5. STAFF
   A member of the Student Union financial team receives the checks once a week.

6. TAKE TO BANK
   The deposit is prepared, taken to a Bank of America, deposited and processed by Business Manager. The deposit posts to Track Spending when done.

PLEASE REFER TO THE STUDENT GROUP RULES, RESTRICTIONS AND POLICIES SECTION OF THIS GUIDE. STUDENT GROUPS ARE HELD ACCOUNTABLE FOR COMPLIANCE.
CASHNET

(Accepting credit card payments)

1. ACCEPTING CREDIT CARD PAYMENTS

   Student Union offers Cashnet as a way for student groups to accept credit card payments for registration fees, collecting dues or selling items. There is a 3% credit card fee deducted from the student group account. Student groups can never accept credit card information to process through the Cashnet link directly.

2. DO NOT USE

   Venmo, PayPal, Square and similar apps are strictly prohibited.

3. CASHNET APPLICATION

   Fill out a CashNet application which can be found on the SU website.

4. BUSINESS COORDINATOR

   Email the application to the student group’s assigned Business Coordinator. Please allow 2 weeks to activate the CashNet account.

5. ONE APPLICATION PER EVENT

   Applications should be completed each time a CashNet link is being used, even if it is for the same event.

6. FUNDS DEPOSITED

   Money collected from the credit cards is posted to the account designated on the CashNet application. Please allow two weeks for Track Spending to reflect the funds.

Please refer to the Student Group Rules, Restrictions and Policies section of this guide. Student Groups are held accountable for compliance.
PENDING REQUESTS
(REQUESTS NOT POSTED TO TRACK SPENDING)

1 FILTER STATUS

- Submitted: Select this status for requests that need to be submitted but do not have status information.
- Unsubmitted: Choose this status for requests that need to be reviewed.

Outstanding pending requests can be seen by the individual who created the form, and the treasurer can see all pending requests.

2 CONSISTENTLY REVIEW

- Timely processing: Status update; email business coordinator with student group name and request transaction number.
- Accurate records: As soon as a dollar amount has been entered into a save request form, the available balance will immediately reflect the credit or debit.

Unsubmitted requests:
Requests that need to be deleted.

3 DELETE A REQUEST

Locate the request form to be deleted in the pending request list.
Hover over the request form that should be deleted and a pop up box will appear.
Select delete and a message box will pop up asking permission to delete.

4 DUPLICATE A REQUEST

Once the request form is saved, hover over the request form and a pop up box will appear.
Select duplicate and a message box will pop up asking permission to duplicate. Note that the original request form has only one transaction number assigned to it - the duplicated request form will show the new transaction number assigned but below it will reference the original transaction number for reference.

Continue to fill out the newly duplicated request form by updating any necessary information and submit:
- Description
- Who is being paid
- Amount
- Account
STUDENT GROUP RULES

1. **No Outside Bank Accounts**
   - Student Union groups can’t use personal bank accounts. Venmo, Go Fund Me, PayPal, Square or other similar apps to hold or collect money.

2. **No Spending Before Funding**
   - Student Union will not reimburse students for expenses incurred before funding is allocated for an event or non-event purchase.

3. **No Moving Funds Between Accounts**
   - Once the request has been processed and posted in Track Spending.

4. **No Overdrafts**
   - Requests can’t take the account balance below zero.

5. **14 Day Rule**
   - All reimbursement requests must be submitted in Sufficient within 14 days of the date on the receipt.

6. **No Payments for Services**
   - Student groups are not allowed to pay for contracted services out of pocket. These payments must be made directly to the service or performance provider or on a university check.

7. **No Transactions Outside of Student Union**
   - Any financial transactions affecting the student group accounts must be processed within Student Union.

8. **No Programming After Last Day to Program**
   - Student groups may request an exception in WUGO. Student groups will not be eligible to receive reimbursements for any unapproved event.
Restricted Purchases

The following items may only be purchased using funds from the fundraising and gift accounts.

- Apparel purchased to be sold for profit
- Beer and wine
- Contributions and donations
- Early arrival/late stay housing charges
- Resources SU offers (i.e. websites and domains)
- Events/Items directly related to the recruiting process for jobs or internships
- Fines, damages, loss
- Individual membership dues
- Meals more than $20 per person
- Recordings/Photography purchased for profit or archiving
- Fundraising expenses
- Varsity athletics
- Student group or fraternity/sorority initiation
- Closed rush events
- Expenses related to tabling at the Fall and Spring Activities Fair
- Giveaway or prizes
- Off-Campus advertising
- Services Between Student Groups

The following items are prohibited from purchase using any funds from all accounts.

- Candles
- Cellular phone or pager expenses
- Class projects for which students receive academic credit
- Gift Cards
- Hard Alcohol or drinkware such as: shot glasses, steins, etc...
- Improvements to University property and/or facilities
- Power tools
- Purchase of food and/or supplies for group events using meal points/Bear Bucks

Donations To Outside Organizations

Student Union will not reimburse individuals for donations through Check Requests. Donations must be made directly from WashU in the name of WashU.

Donations paid to charitable organizations are tax deductible for the payer and the receipt will be in the payee’s name. For this reason, we do not allow reimbursements to students for charitable donations. If you will be making a charitable tax-deductible donation, please be sure to make it using a Washington University check or a Washington University VISA card rather than having a student pay out of pocket. If the department wishes to proceed with reimbursement of this donation, the reimbursement will be taxable to the student and should be paid through payroll.
Background Checks

Student Union will only pay for background checks provided by the University. Student Union will not pay for additional background checks mandated by a national organization or any other third party. If additional backgrounds are needed groups must use their fundraising or gift accounts. To receive a background check, follow the instructions on the Campus Card Services Website. Notify them that you are receiving the background check on behalf of SU and provide the SU billing reference (9125).
STUDENT GROUP POLICIES

Conflict of Interest Policy
Students conducting business on behalf of student groups registered with Student Union (hereinafter “student groups”) have a responsibility to do so in a manner that is objective and ethical. The goal of all such dealings must be to benefit the student group and University students in general.

The following policies apply:

- Student group members will conduct student group business ethically and objectively, in compliance with all applicable laws, regulations and University policies, including the University Judicial Code.
- No organization operating as a standalone non-profit organization or for-profit business may be recognized by Student Union.
- The purchase of goods or services from a business in which a student, family member or friend has a financial interest, or may directly benefit from such purchase, is a potential conflict of interest. Such situations must be disclosed to the Student Union Business Manager for review prior to the disbursement of funds for that item or service.
- In conducting student group business, students may encounter offers of gifts from suppliers. The following guidelines apply:
  - Offers of gifts should generally be refused.
  - Gifts of cash or monetary gifts of any kind or amount may never be accepted by students. While there may be occasion to accept gifts of nominal value (for example company promotional trinkets, pens or note pads, etc.), these or other gifts should never be accepted in return for a business favor. Such gifts may not directly or indirectly influence the student’s business judgment or give the appearance of impropriety. The cumulative value of gifts received from all suppliers in total should not exceed $25 in any 12-month period.
  - Students should review with the Student Union Business Manager all offers of gifts prior to acceptance.
  - Any promotional benefit that results from a business transaction must be provided to the student group (or any other student group registered with the Student Union) and not to an individual student.
  - No member of a student group may accept any sum from any supplier attempting to “reward” a student for the decision to do business with the supplier.
  - Student group members must provide equal opportunity to firms wishing to pursue business relationships with the University.
  - Any breach of this policy may result in referral of the student(s) to the University Judicial Administrator and may also result in legal actions, freezing of the student group account and the termination of the business relationship with the supplier.

Undergraduate Attendance Policy
For all SU recognized group events that are funded in any way from operating, revenue, or appeals accounts, at least 85% of those in attendance must be Washington University undergraduate students. However, if the event is a performance and if venue capacity allows, the remainder of the event access may be made available to non-undergraduate students. Exceptions can also be made by Vice President of Finance (finance@su.wustl.edu)
Large Scale On-Campus Fundraising Events
Groups that exist solely to plan/put on large-scale fundraising events on campus (e.g. Dance Marathon and Relay for Life) and use Operating money to help put on the event must apply for an exception to the Vice President of Finance. These exceptions will be made on a yearly basis. Please contact the Vice President of Finance (finance@su.wustl.edu) at the beginning of the school year to begin this process. Any registration fees being charged or collected for an event must be deposited into the SU account being used to pay for the related event expenses.

Last Day to Program Exception Requests
We ask that groups not program during reading and finals weeks. The Last Day to Program rule helps to ensure that students take a break from their student group activities to focus on studying for exams. Groups may request an exception for reading/finals week by filling out this request form on WUGO. Exceptions are made for study-break type events with minimal planning involved. If missing the event will negatively impact members in any way, the event will not be approved.

Student groups will not be eligible to receive reimbursement for any unapproved event.

Deregistered Groups
Student Union reserves the right to recollect any and all funding remaining in any group account in the event of deregistration. This includes SU allocations, fundraising and gift balances. All recollected SU allocations will be placed in a Student Union reserve account to be administered towards general student group allocations. Recollected fundraising or gift funds will be placed in the SU Saving - Mental Health Fund.

Competition Prizes Policy
Undergraduate recognized student groups are able to represent the University at tournaments and competitions off campus. Competition Prizes Statement was created to ensure that any prize money or items won at a competition will be utilized for the use of the recognized student group and not for individual use.

Any funds awarded in a competition will be deposited into the recognized student group fundraising account. Individuals cannot keep money awarded for a prize in their competitions if SU has funded full/partial the competition. The money/item won would belong to the recognized student group.

For non-compliance with the guidelines above the recognized student group will be subject to sanctions at the discretion of Campus Life and/or Student Union. Sanctions include but not limited to loss of future funding and the group’s account could be frozen.

Room Reservation Policy
Undergraduate Student Union recognized groups have the opportunity to reserve rooms on the Danforth campus. Student group room reservation privileges cannot be utilized for personal use. The Campus Life Room Reservation Statement was created to ensure that room reservations are only for recognized student group use.

For non-compliance with the guidelines above the student group will be subject to sanctions at the discretion of Student Union. Sanctions include, but not limited to loss of reservation privileges and the group’s financial account frozen.
**Electronic Waivers Policy**

Electronic waivers are a benefit available to your student group to use for high impact events/programs involving a large number of participants.

Setting up an “E-Waiver” will allow you to present a participant (student/non-student/minor) with a webpage that will allow accepting and signing a legal waiver that is approved by Washington University’s legal department.

To get more information about acquiring an E-Waiver please contact the Program Coordinator you are working with in the Campus Life office for additional information.

**Student Services Policy**

Student groups are not allowed to hire members of their own student group for paid services. If a student is hired from outside the student group, Student Union will pay up to $15 per hour using allocated funds and a contract is required for the service rendered. Any rate in excess of $15 per hour must be paid from student group fundraising or gift accounts.

Student groups that contract employees/student employees of the University for services should be aware that labor laws prevent hourly employee’s/student employees from working more than 40 hours per week unless their employer is willing to increase their rate of pay to time and a half for hours worked in excess of 40. Paid workers must not work over 40 hours per week. If this should occur, the student group will be responsible for paying time and a half. No student or student group may provide services under a name or in such a way that it could be construed as running a business. No Student Union resources should be used.

**Failure to Follow policies**

Failure to follow these financial policies can lead to various penalties against the group or individual who commits the infraction. Penalties include but are not limited to: a warning, a fine levied on the group, deregistration of the group, or reporting the individual responsible to the University. To see a list of disciplinary actions which might be taken by Student Union, please see Article VI, Section 7 of the Student Union Statutes. [Click here to see the SU Statutes.](#)

Because the University Judicial Code applies to student group conduct, the University reserves the right to undertake a review process conducted by a member of the Student Union or Campus Life staff when concerns arise regarding appropriate utilization of student group funds. Sanctions may be imposed on individuals and student groups through this process.

**Disclaimer**

All Student Union recognized student groups and individuals within the student groups are held to high standards of conduct and are expected to adhere to University, Campus Life and Student Union policies and guidelines.

Student groups and individuals are held accountable when concerns arise regarding appropriate utilization of student group funds.

Student groups and individuals that misuse of any of the business accounts, SU credit cards, utilize outside back accounts or fail to comply with set policies are referred to the Campus Life’s Student Group Conduct process.

**Student Union reserves the right to update or add policies as needed**
RESOURCES FOR FALL 2020

Office Resources

These resources are available to any recognized student group. If you are interested in using any of these resources please contact Campus Life or your business coordinator:

- Student Group Mail Folders (group responsible for checking these without notification)
- Tax-exempt student groups can save on tax when purchasing and payments to merchants in Missouri with the University Sales Tax Exempt letter. Contact a Business Coordinator for assistance.

Student Union Office Addresses:

<table>
<thead>
<tr>
<th>UPS / FEDEX</th>
<th>United States Postal Service (USPS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Student Group</td>
<td>Name of Student Group</td>
</tr>
<tr>
<td>Washington University in St Louis</td>
<td>Washington University in St. Louis</td>
</tr>
<tr>
<td>6475 Forsyth Blvd</td>
<td>One Brookings Drive</td>
</tr>
<tr>
<td>DUC Room 270/250 CB 1128</td>
<td>Campus Box 1128</td>
</tr>
<tr>
<td>St Louis, MO 63105</td>
<td>St. Louis, MO 63130</td>
</tr>
</tbody>
</table>

Student Union Opportunity Fund

Student Union is dedicated towards the idea that socioeconomic status should not prevent any student from having a complete undergraduate experience. With this idea in mind, the Student Union Opportunity Fund was established in November of 2017 and endowed with $300,000 on February 15th of 2019. Student Group Leaders and Members are encouraged to take advantage of this amazing opportunity and advertise the fund and use it when eligible.

For more information, please contact the Vice President of Finance at finance@su.wustl.edu.
Student Union reserves the right to update or add additional policies as needed throughout the academic year.