Club Conference Funding Request

Before Submitting a Funding Request:

- Make sure to review the Conference Travel Policy available on OrgSync and on the Student Affairs website:
  - [https://orgsync.com/44434/files/354427](https://orgsync.com/44434/files/354427)

- Requests must be submitted in OrgSync at least 30 days prior to the conference.
- The Club President must fill out the Budget Request. The President must inform the Office of Student Affairs if he/she is having a designee complete this process.

Request Funding:

1) Login into OrgSync and click on “Browse Organizations” then select “Student Central”
2) On the top of the page, click, select “More” then “Treasury”
3) On the next page, click “Manage Budgets”

3) Click on the green button labeled “New Budget”
4) Make sure the current budget period is selected
5) Fill out the fields indicated below:

a) **Budget Name** – insert the name of the conference (this is how the attendees will search for the budget when they get ready to submit a reimbursement request)
b) **Category** – select "Club Conferences"
c) **Fill out** - once you click “Club Conferences” a form will pop up that you need to fill out asking for more information on the conference and the names of all the students who will be attending. If it doesn't pop up automatically click on "Fill Out"
d) **Name** – insert the name of the conference again

e) **Line item** – select an option in the drop down box, write a description and insert the approximate cost
   --If you need to add more categories click on the “+ Add Line Item” box
f) **Upload Documents** – this section is not necessary for club conferences

g) **Comments** – feel free to leave any additional comments that you feel are necessary

h) **Submit** – click “submit” after you are finished

**Special Note:** "Add budget item" and "Add Summary" should not be used unless you have received special approval for an exception by the Student Services Coordinator or Director of Student Affairs
**Funding Approval:**
- You will receive an e-mail through OrgSync informing you if your request has been approved and for the amount. In order to receive this e-mail you will need to ensure your notifications are turned on (settings > manage account > notification settings) or you’ll need to go back and regularly check the status.
- If there are any problems with your request, or additional information is needed, comments will be written in the comments section of your budget request. Again, make sure your notification settings are turned on.
- Once approved each attendee will need to fill out the Conference Agreement Form at least two weeks prior to your departure date: [https://orgsync.com/44434/forms/66780](https://orgsync.com/44434/forms/66780)
  - Since the person submitting the form will be the person notified of approval, you will need to let each attendee know that they request was approved, for how much, and instruct them to fill out the Conference Agreement Form.

**Reimbursement Request – each conference attendee fills this out:**
- You must submit your reimbursement request in OrgSync and submit all original receipts, boarding passes, and conference name badges to the Office of Student Affairs within 14 days of your return.

1. Once logged into OrgSync go to “Brose Organizations” then select “Student Central”
2. On the top of the page click, select “More” then “Treasury” (See step 2 in the “request funding” section)
3. Find your name in the list and click on it (If for some reason you named your budget something other than your name, find the name that you chose for your budget request submission)

4. Once you click on you budget you'll either need to click on:
   - The name of your budget again 
   - the “Details” button.

### List of budget names

![List of budget names]

![Budget name: AAMC OSR Annual Meeting](https://example.com/budget-name)

<table>
<thead>
<tr>
<th>Name</th>
<th>Requested</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAMC OSR</td>
<td>$3,800.00</td>
<td>$2,000.00</td>
</tr>
</tbody>
</table>
5. Then click on the “Request Payment” button

6. In the “Payment Type” box, select “Reimbursement”
   a. A form will pop up asking you for your name, mailing address, and Kerberos ID
   b. You’ll also need to type a one paragraph reflection that discusses how the conference added to your professional growth as a medical student
   c. You’ll need to type the exact amount that you are requesting
   d. Press the “upload” button and upload e-receipts or scanned copies of your original receipts. We do not accept paper copies of receipts so please ensure you upload clear copies of your receipts in order to process your reimbursement (date, amount, itemized list of what was purchased, business/vendor, etc all need to be visible).
   e. Once you are finished, click “submit.” You’ll receive a message letting you know when your request is approved