Step-wise process of having an event funded by your student council group funds:

1. Come up with an idea for event and start planning it.

2. **Email me for pre-approval for all purchases.** This email should include the basic "who, what, when, why, where" information. Emphasis on the "why" because the university wants to know why this particular event is important to us as medical students and why they should pay for it.

3. I will either say yes you are pre-approved to spend up to $X amount or no.

4. If I say yes, I will direct you as to how we will proceed. Either you will spend the money yourself and then get reimbursed (slow process) OR you will order the food and an administrator will call and pay with a card (fast process). This being said, we need to know about the event in advance (at least 2 weeks) to set up payment.

5. If you spent the money yourself, go to the student council website [https://sites.google.com/site/umnmedstucouncil/treasury](https://sites.google.com/site/umnmedstucouncil/treasury), and there is all the information you need to get your reimbursement. Keep in mind these forms are eventually going to an administrator, so please write clearly and be descriptive.

6. Mail me the correct, completed forms (see below) to the address on the website. Ask me if you have any questions before you mail them.

7. I will look over the forms, email you with any questions, and then turn them in to an administrator. At this point the forms are out of my hands, and how long it takes varies. You can email me and ask what the status is on your reimbursement if you have been waiting longer than 6 weeks, and I will help you.

8. You will receive a check in the mail! Reimbursement process is complete.

**Forms:**

1. 2014-2015 Reimbursement Form: this is required for all reimbursements. Fill it out completely, write clearly, and must include a brief description of event.

2. W-9 form: this is required if you are being reimbursed for $100.00 or more. You must fill this out completely with your information, not your student group information. I only need the first page with your SSN and signature. You can discard the last three pages.

3. Food form: this is required if you are having a "hospitality" event where you are serving food. Please fill this out completely, but ignore the middle section (fund, dept ID, etc), and include the benefit to the university. Again, why should the university fund this event. Be descriptive. Please include a list of attendees or sign-in sheet.

4. Lastly, I also need the original, itemized receipt. The university will not accept scanned copies and please do not highlight the receipt. You can either just place it in the envelope or tape it to a blank sheet of paper. If the original receipt is not available, you may fill out the Statement in Lieu of Receipt form.
Additional Information:

Contracts and Payments for Non-University Venues and Paid Speakers:

- All contracts for venues and speakers must be preapproved, signed, and paid for through the University Medical School
- Authorization: all contracts for speakers and venues must be signed by medical school staff
- Student Council Budget: if these are contracts or speakers for student council events or activities to be funded by the student council budget, the student council executive treasurer must preapprove funding
- All other events: any other event that is not sponsored or funded through the student council must be preapproved and facilitated by the Director of Student Support.
- Timing: Submission for preapproval must be a minimum of two months prior to the event taking place.

Contracts and Payments for University Venues and Volunteer Speakers:

- Guest speakers presenting on a voluntary basis do not require prior approval
- Pre-approved expenses for some University facilities can be paid for with an internal transfer of funds, which can be facilitated by the student council executive treasurer for student council events or by the Director of Student Support for all others.

PLEASE NOTE: Individual students should never use their personal credit card, cash, or personal checking account to pay for speakers or facilities at medical school student events on behalf of their student organizations. This includes payment online, by mail, and in person. In addition, individual students should never sign contracts for outside venues or for securing services of speakers/consultants. Payments and authorization are handled according to the above procedures.

Rational and Sanctions: Students who sign contracts for and/or provide personal payment for outside venues may be held personally liable for accidents during the event. In addition, any reimbursement will be delayed, and the medical school does not receive the U of M discount and tax free benefits. Events that do not follow the above procedures run the risk of being cancelled for one or more years.

Contacts:

- Addy Irvine
  - Program, Student Advising, and Events Coordinator
  - Email: abrickwe@umn.edu
  - Office: B683 Mayo Memorial Building
- Amber Retzlaff
  - Student Council Executive Treasurer
  - Email: umn.medtreasurer@gmail.com