Student Organization Financial Forms Authorized Signature Policy

Overview
In an effort to manage spending within student organizations and to ensure ethical use of student activity fee funds, the Office of Student Involvement and the Controller’s Office require that all student organization fund transfers and expenditures be routed through the Office of Student Involvement staff for final signature and processing.

Effecting Operational Business Forms
The following operational business forms are included in this policy. The Student Involvement staff members listed below serve as the final authorized signature for the forms listed. Leah Busam, Senior Director for Student Affairs, also has signatory authority in the event that assigned staff members are unavailable.

- Check Request: Dustin Lewis
- Interdepartmental Transfer: Dustin Lewis
- Purchase Requisition / Xavier Buy: Dustin Lewis
- Independent Contractor: Dustin Lewis
- Student Cash Advance: Dustin Lewis
- Student Cash Reimbursement: Dustin Lewis

Process

1. Student Organization members complete the appropriate operational business form using the correct fund and account numbers and providing supporting documentation required to process the form.

2. The student organization member is responsible for routing the operational business form to the advisor of record for the student organization for signature of approval.

3. Completed operational business forms will be routed to the Office of Student Involvement by the student organization member that completed the form. OSI will provide a drop box for students to submit the completed form.* Any completed business forms that are submitted to the Controller’s or Bursar’s Offices or Accounts Payable without an authorized signature from Student Involvement will be forwarded to the Office of Student Involvement for review.

4. OSI Staff reviews/verifies the following information on each submitted form:
   a. Correct fund number
   b. Correct account number
   c. Amount requested is checked against available funds in Banner
   d. Explanation/justification for expense or reimbursement
   e. Advisor signature
   f. Attachments (receipts, invoices, contracts, etc.)

   OSI staff will follow up with any questions or concerns to the student organization related to their financial request.

5. OSI staff log completed, processed forms in a worksheet on the department shared drive.

6. Once signed, completed forms are mailed to Accounts Payable, with the exception of Student Cash Disbursements. Disbursement forms will be available in the pick-up box in OSI for student organization members to deliver to the Bursar’s Office.

7. Checks cut for payables will continue to be disbursed from the Controller’s Office.

*Student Involvement staff have dedicated times each day to review submitted forms. All forms will be processed in a timely manner, however, students will not receive immediate review and signature. Therefore, it is imperative that student organizations and advisors plan ahead and prepare forms well in advance to ensure timeliness.