

Requesting a B-1 Request

Please remember that it can take up to seven (7) days for you to get approval to spend your money. It is important to request your funds with plenty of lead-time. It is never too early to submit your B-1 but please remember that there will be no reimbursements or use of the University credit card if you do not have an "Approved" B-1 form. There can be no exceptions to this policy.

OrgSync has mad this process a lot easier. To submit a B-1 (spending request), hover over 'Treasury' along your portal's left-hand navigation and select 'Budgets.' The resulting page is populated by your portal's budget requests for the current budget period. To view past budget periods, utilize the dropdown provided.

Budgets		Revenue Fund \$84,750.00				
Period	General Expense 1/1/12-12/31/12 					
Name	Submitted	Status	Requested	Approved	Paid	
End of the year Concert	 1	December 19, 2012	Approved	\$200.00	\$150.00	\$0.00

Select the budget under which are you requesting a B-1 for. On the resulting page, each budget item is listed and can be accessed with the 'Details' button.

Conferences

Name	Requested	Approved	Committed	
NACA	\$300.00	\$200.00	\$150.00	Details

All line items under this budget item are listed on this page. If the budget was approved, you can see how much was approved for each line item. A 'Request Spending Authorization' button will appear below.

 Spending Requests (\$50.00 Remaining)		Request Spending Authorization			
Name	Submission Date	Status	Requested	Approved	
NACA Spending	 1	December 13, 2012	Approved	\$150.00	\$150.00

On the resulting page, you will find some instructions to completing the B-1 form. Please make sure to include all the information that is requesting and provide any additional information you feel is important. Enter how much you would like to request for each line item, including any money that you would like to spend out of your "Revenue Account" (fundraised money). Your remaining balance will be listed. As you enter different amounts, the totals will update to reflect the total sum requested.

Spending Request Details

Name

All Programming (Entertainment/Programming/Prizes)

No.	Line Item	Remaining Budget Fund	Request to Spend Budget	Remaining Revenue Fund	Request to Spend Revenue Fund
1	Agent Fees	\$1,000.00	<input type="text" value="1000.00"/>	\$100.00	<input type="text" value="100.00"/>
Totals:		\$1,000.00	\$1,000.00	\$100.00	\$100.00

Upload Documents

If you need to upload scanned or electronic documents, you can do so here. Max file size is 10 MB.

There are no uploads for this request

Comments

If you filled out a form with the initial budget request, it will appear on this page. You can make changes to the form before you submit. Just like a budget request, you are provided the option to upload documents and make comments.

The amount entered in the “Request to Spend Budget” is the amount you want to spend on this specific purchase and may not be the total amount that you have. In addition, you can spend out of you savings account by entering the amount you want to spend in the “Request to Spend Revenue Fund” field.

To finish, click 'Submit' at the bottom of the page. You will receive a confirmation of the submission and will be notified of any status changes.