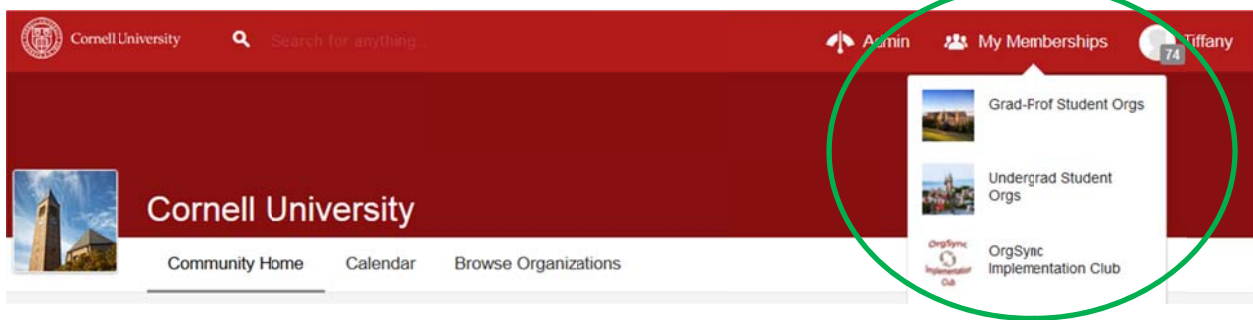


# How to Request a Budget in OrgSync

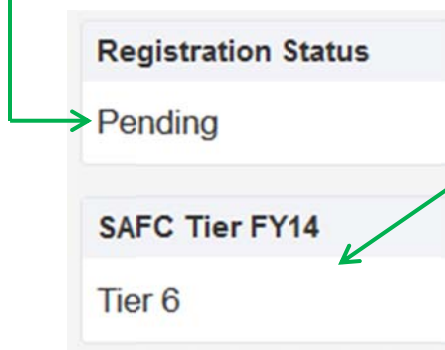
**BEFORE YOU SUBMIT A BUDGET, PLEASE CONFIRM THAT YOU ARE A FULLY APPROVED STUDENT ORGANIZATION.**

Your budget request will be denied if you are not an approved organization.

To do this, view your organization by logging into OrgSync, selecting “My Memberships” and clicking on your organization.



Select the “**Profile**” tab and view your registration status. If your status is still **pending**, you are not eligible to apply for a budget. If your status is **approved**, you may continue to the next page.



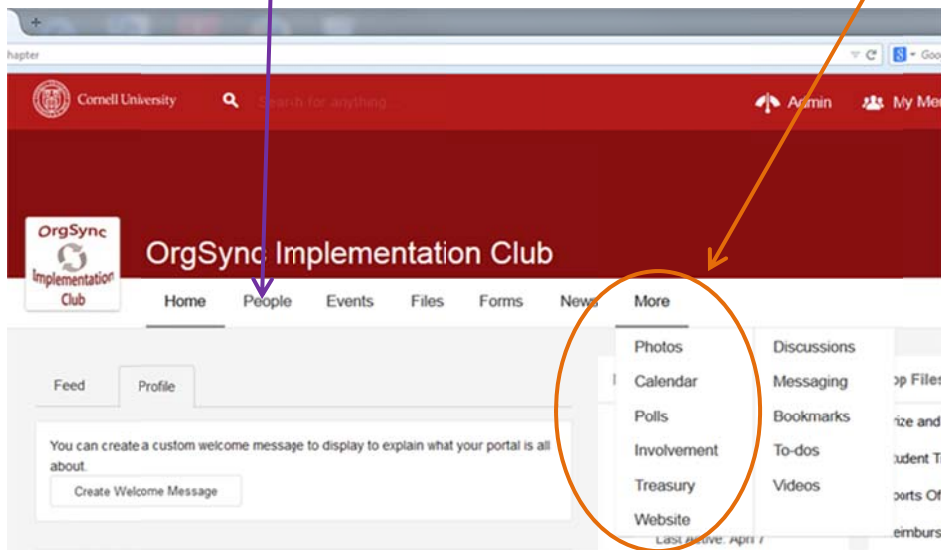
[Undergrad (SAFC) organizations only]

Also on your profile will be the SAFC Tier your group is assigned to. The tier spending limitations are as follows:

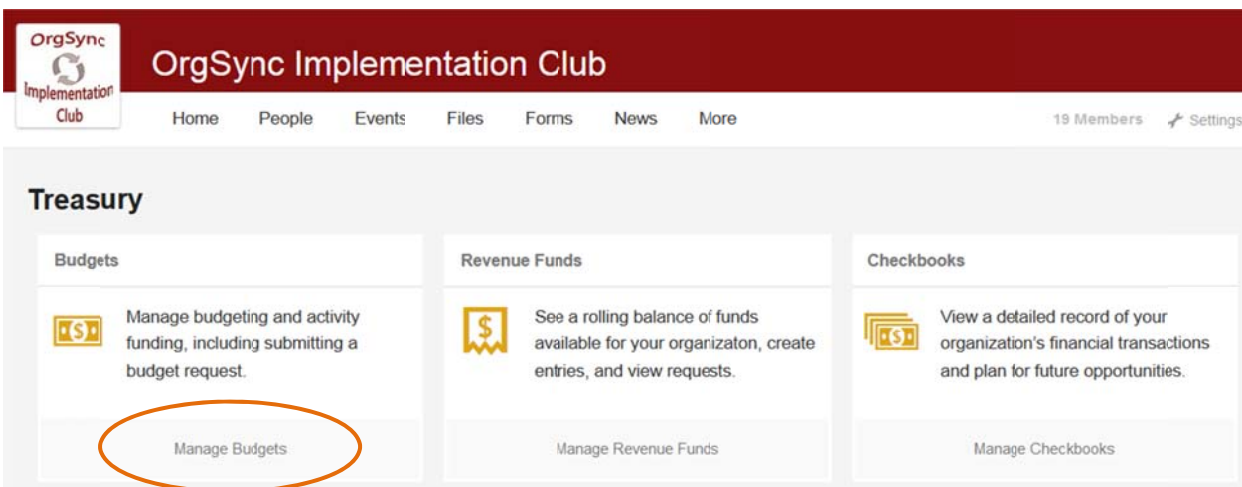
- Tier 6: \$1,000
- Tier 5: \$2,000
- Tier 4: \$3,000
- Tier 3: \$4,000
- Tier 2: \$5,000
- Performance Tier: \$7,500

**1** From your organization's portal, use the navigation panel on the left - hover over "More" then select "Treasury"

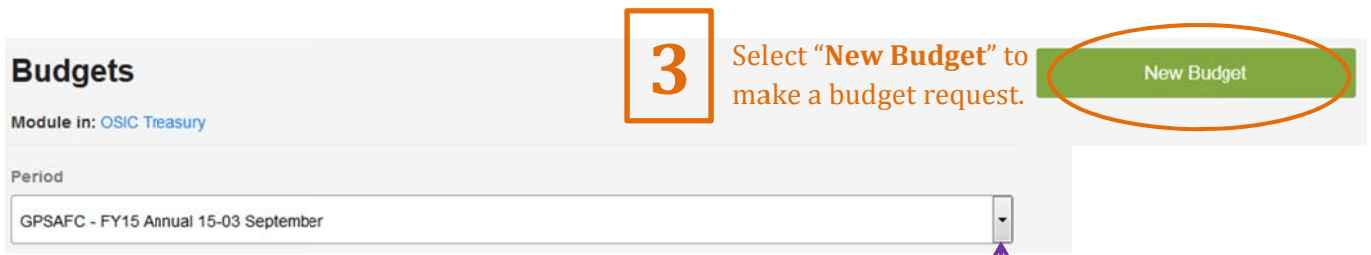
If you do not see this option available, you must request that the person who registered your group give you permission to submit a budget. To do this, he/she must log into the portal, click on "People," then your name, and



**2** Select "Manage Budgets."



This page will show you your budget request and its status. Please note that your group should only ever have ONE budget in any given budget period.



The screenshot shows a web interface for 'Budgets'. At the top left, the title 'Budgets' is displayed in bold. Below it, the text 'Module in: OSIC Treasury' is shown. A 'Period' dropdown menu is visible, currently set to 'GPSAFC - FY15 Annual 15-03 September'. To the right of the interface, there is a green button labeled 'New Budget'. An orange box with the number '3' is placed next to the text 'Select "New Budget" to make a budget request.' An orange oval highlights the 'New Budget' button. A purple arrow points from the text below to the dropdown menu.

To view your budget in a different period, use the drop down menu to change the budget period. The current budget period will always be the default display.

This is the form to complete for a budget request. **Please note that you should have all applicable documents ready to upload to OrgSync as you will be asked to attach them at this time.** Also note that Budget Periods and Categories are specific to SAFC and GPSAFC and may not be reflected as such on this training.

# Create a New Budget Request

**Instructions**

Your organization must upload any supporting documents for your budgets. Note: Do not click SUBMIT until entire budget is complete including comments. Comments are submitted via "ENTER", not the submit button.

**Budget Name**

**Budget Period:**

GPSAFC - FY15 Annual 15-03 September

**Budget Details**

**BUDGET ITEM**

Category: -- Select -- Name:

No.	Line Item	Description (optional)	Request a Budget
	<input type="text"/>	<input type="text"/>	0.00
+ Add Line Item			\$ 0.00

+ Add Summary

**Add Budget Item**

**Total for Budget Fund:** \$ 0.00

4

Enter the name of your budget and select the appropriate budget period.

5

Select the appropriate budget category for the first budget item from the dropdown menu.

Budget Name  
OrgSync Implementation Club - Fall 2014

Budget Period:  
SAFC - FY15 Fall Budget

Budget Details

BUDGET ITEM

Category: -- Select -- Name:

No. Line Item Description (optional) Request a Budget

0.00

+ AddLine Item \$ 0.00

+ Add Summary

Add Budget Item

Total for Budget Fund: \$ 0.00

6

Provide a name for your budget item.

Budget Name  
OrgSync Implementation Club - Fall 2014

Budget Period:  
SAFC - FY15 Fall Budget

Budget Details

BUDGET ITEM

Category: Local Event - 920 Name: Fall Concert

No. Line Item Description (optional) Request a Budget

0.00

+ Add \$ 0.00

+ Add

Add Budget Item

Total for Budget Fund: \$ 0.00

7

Enter the information for the line item by selecting the type of item, providing a description, and the requested amount.

To add additional line items within this budget item, select **"Add Line Item."**

No.	Line Item	Description (optional)	Request a Budget
	Rentals / Services	Tent Rental	300.00
			\$ 300.00

8

Once you have entered all line items, add a summary for your budget item.

9

Add Budget Item

Total for Budget Fund: \$ 300.00

Click **"Add Budget Item"** to request additional funding for this budget period.

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.

Upload

Any Additional Comments?

Write a Comment...

Submit Save & Finish Later

10

Upload all documentation in support of the budget request for this budget period. Please name your files in the following way:

**"[Budget Item Name] Document [1]"**

For example, in the budget request example provided above, the documents would be named:

- "Fall Concert Document 1"
- "Fall Concert Document 2"

11

Click **"Save & Finish Later."**

12

Your organization must have three “signatures” before submitting the budget request. To do this, the treasurer, president, and advisor will open the budget request and enter three separate comments.

To grant access to the budget module for these people, log into the portal, click on “**People**,” then their name, and check off “**Budgets**” on the permissions tab.

Comments

Tiffany Lind  
Treasurer approves this budget request.  
11:09am Today

Johnathan Hart  
President approves this budget request.  
11:25am Today

Theresa Boslett  
Advisor approves this budget request.  
12:42pm Today

Leave a Comment

Save & Finish Later Submit

13

Once the treasurer, president and advisor have approved the budget request, you may submit it to the SAFC by clicking “**Submit**.”

If an issue is identified with your group’s budget request, a request for additional information will be submitted and an email will be sent from OrgSync indicating that your budget request has been **denied**. Within your portal, you will also see the status of your budget request change to “**Denied**.”

**Budget Request Denied**

Your budget request OrgSync Implementation Club - Fall 2014 has been denied in OrgSync Implementation Club

View Notification

[View all of your OrgSync notifications](#)

Submitted	Name	Status	Requested	Approved	Paid
Jul 25, 2014	OrgSync Implementation Club - Fall 2014	<b>DENIED</b>	\$300.00	N/A	N/A

Review the comment(s) and take the appropriate action or request a Budget Hearing by contacting Terry Ector (tle2) for SAFC or Marie Roller (mr36) for GPSAFC.