Money Matters
Student Finance Handbook

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Finance Rules

ALL FINANCE RULES ARE BASED UPON UNIVERSITY OF IDAHO POLICIES.

The law school is a cog in a bigger wheel of the university, which is a non- profit organization. Therefore, it is vital that we ALL comply with university policies and procedures.

UI Policies apply to Event Approval Forms, Funding Approval Requests, Donations, Bank Accounts, Gift Requests, and Alcohol permits.

Accounts Payable handles all employee, student, and business transactions for the University. All College of Law finance runs through Accounts Payable.

Therefore, when they process transactions, they may request more information. If that is the case, we will follow up with your student group for additional information.

Financial transactions are not completed until we have ALL requested information completed and submitted.

SBA Funding: Process

Each semester, the president of each student organization will complete the Organization Registration Form and the Allocation Request Form.

Next, your Student Bar Association leaders will consider your allocation request and past and proposed future events. With this information, they will make a recommendation for each organization to the Associate Deans of Students.

Finally, the Associate Deans of Students will distribute allocations depending on the allocation request, SBA Recommendation, and available funding.

You will not receive any funds if you do not complete the Registration and Allocation Request forms.

If your organization runs out of money, but you have additional expenses, the club treasurer may complete a Supplemental Request for events. Each club will receive a link to this form in their allocation email from the ADSAs.

It is a requirement of the Club Treasurer to budget, track, and account for expenditures that have occurred.

If your organization would like a finance update, the Student Services Manager can provide a number accurate to the 1st day of the previous month. New files are typically created in the second week of each month (depending on month end). Remember: *Numbers are only accurate for fully processed transactions.*

Other Funding Sources: Fundraising and Donations

Fundraising

There is a 10% charge upon deposit of funds.

The college does not have access to electronic payment systems (Venmo, paypal, etc.).

A check can be issued to the University of Idaho College of law with 'SBA- (enter club name here)' in the memo line

All checks and cash can be provided to the Student Services Manager or the Fiscal Officer.

Donations

Donations may only be solicited under very special circumstances. You MUST work with the director of development on ANY and ALL donations.

All donations go through the University of Idaho Foundation.

There is a 5% charge upon deposit of a donation. All donations to the University of Idaho are subject to that charge.

Other Considerations:

Cash Box

The cash box is available upon request and includes $50 in funds to assist in cash payments. You may have to make your own change.

Requests must be made five (5) business days prior to the event.

The Cash Box must be returned the next business day with the designated cash ($50) inside.

The club treasurer is responsible for the signing in and out of the cash box and its funds.

Cash Handling and Accounting

All cash to be deposited must be clearly accounted for. A receipt book is available for use when selling tickets, etc. Detailed receipts or a ledger must be turned in with the cash deposit. Funds must be turned in within 48 (business) hours to the Student Services Manager (Moscow) or Student Services Coordinator (Boise).

Event and Funding Approval Process

The funding approval process is essential to student groups. The funding approval survey must be used when any student group is spending *any* money. This goes for an event, subscriptions, plaques, etc. The spending of money must have a valid educational and/ or business purpose.

Funding approval requests are submitted via a Qualtrics survey. The survey can be found in the Canvas classroom and the link will be sent out with allocation notifications.

Funding Request Form (EAF)

- The club treasurer is responsible for submitting all funding requests. We will not accept a funding request from anyone other than the treasurer.

- It is important that as many details as possible are included on the request.
    - Answer each question in the survey!

- The request must be submitted *no less than 10 business days* prior to the event/ spending. Requests submitted after that timeline run the risk of not being approved.

- Requests submitted after the event and/or spending of money are subject to the College of Law Deans direct review and approval.

- If you spend money without approval, *you will not get reimbursed.*

    - If the paperwork is not submitted on time and completely approved – this includes the times a physical paper is required for signature – then we cannot process a reimbursement.

- A list of attendees for meetings or events must specify the names of any UI employee attending. You can submit your completed attendee list to law-eaf@uidaho.edu within 24 hours following your event.

    - If your student event has less than 10 attendees, you must also submit the list of student names to law-eaf@uidaho.edu following your event

    - Reimbursement forms cannot be processed if the attendee list has not been submitted.

We meet twice a week to review requests, and we will try to get back to you as soon as possible. Same day requests will not be acknowledged.

You will receive a copy of the survey answers to your email; *however*, this is not a confirmation. A separate email confirmation will be sent via law-eaf.

Catering Notes

In Boise, Albertson's is a great option for catering. Please make a note in your Funding Approval Request if this is an option you would like to pursue.

Joint Club Events

Clubs can host events with other clubs and split the funding. Please designate one club and treasurer to submit one EAF. The request must specify the other clubs and the amount of money they will be contributing. Please indicate these details on the Funding Request Form.

In addition, the treasurers from those clubs must send an email to law-eaf confirming the approval of those funds.

Gifts

If your club is planning to buy any gifted items, please check in with law-eaf first. There are lots of university policies surrounding gifts that we must follow. There are many policies concerning gifted items that must be followed including de minimus limits and tax reporting. All intended gifts *must be included in detail* on funding approval requests.

Gift cards *cannot be purchased* with university funds. Aka, you will not be reimbursed.

VandalStore gift cards *might* be an option, but a discussion will need to take place before any purchases are made. Gift cards are subject to university gift requirements.

Travel

Please contact law-eaf before you submit a funding approval request for any purchase related to travel. There are special requirements/policies/procedures for travel. This includes student travel, faculty or staff event participants, or non-employee guest speakers.

Please note: if your group intends to have a UI employee participate and travel for your event, your group is most likely responsible for all or at least part of those travel costs. Under certain circumstances we may be able to find a way to split costs, but you should assume that you are covering the entire cost unless otherwise specified.

Notes on Funding Approval Request Wording

Instead of…	Please use…
"Party"	"Reception" or "Networking Event"
"Snacks"	"Refreshments"
"Student Wellbeing"	Literally anything else.

Notes: the above are suggestions based on experience of language preferred at the university level. Please be mindful of these suggestions! If there is an issue with wording, we may have you correct it via a new form or email chain before proceeding to adhere to the university processes.

Available Payment Types:

Reimbursement (most common)

Personal funds of an individual are used to make a purchase, a reimbursement form is filled out by said individual, and a reimbursement is processed. This form can be found on the Academic Admin page under Student Organizations.

In order to process a reimbursement, you ***must*** include an itemized receipt.

We understand that the use of personal funds asks a lot of a student. We do our best to get reimbursements processed ASAP.

If the paperwork is not submitted on time and completely approved – this includes the times a physical paper is required for signature – then we cannot process a reimbursement. There will be no exceptions to this rule.

Not all items are reimbursable! This is one of the reasons we need full details on the funding request so we can make sure a student doesn't make a purchase they can't be reimbursed for.

> Please note: Amazon purchases are not reimbursable. If you are looking to purchase from Amazon, list those details in the Funding Request Form and that purchase will be coordinated with Student Services through the university systems.

Invoice

This is utilized when an invoice is specifically requested by the business providing the goods or services. For example, renting out a space for an event.

A contact name and email for the business must be included when the invoice is submitted to law-eaf.

The finance team will work to get the business paid through the internal university invoice process. This can take up to 30 days.

Note: If you are utilizing a University of Idaho service, please choose the INVOICE option. This does require some additional information, so please include as much detail as possible on the Funding Approval Request.

- *This option works great for the VandalStore!*
- University of Idaho services include Idaho Eats, Vandal Meats, and the Vandal Store.

Purchasing Card (limited circumstance)

If you think your purchase could be made with a P-Card remotely (such as online or over the phone), please include those details on the additional information part of the Funding Approval Request. The Student Services team will do our best to work with your group while we navigate this limitation. (This is limited – most places can't/won't do tax-exempt online and we cannot have tax on our P-Cards).

All purchases will be coordinated approved and through the Student Services Manager and/or Coordinator. No other law staff can assist with student purchases.

Holding an Event but not Requesting Funding

- If you are holding an event or meeting, but not requesting funding, please reach out to law-events or use the Event Support Request form on the Academic Admin webpage. This helps the events team ensure your event does not overlap with other calendared events – especially if you are hoping for faculty/staff/students to attend.

- You must have a room reserved if you are holding an event in the building (even if you are not using funding). If you just need a room, please refer to the room request guidelines.

- If you would like to promote your event, please reach out to law-events, so we can point you in the right direction. If you have a flyer to submit to digital signage, please use the link on the Academic Admin webpage.

- Please keep in mind that there may be additional guidelines from UI Risk depending on the details of your event. When in doubt, send your event details to law-events and we will work with your group to determine if additional steps are needed.

Alcohol Permits

You may not provide alcohol at any of your events. The ***only*** exceptions to this rule are the Idaho Law Review Symposium and Barristers Ball. The university has stringent policies surrounding alcohol at events.

If you have any questions about having alcohol at one of your group events, please schedule a meeting with the Student Services Manager to discuss.

Contracts

You may ***not*** sign any contracts, no matter what. All contracts must be sent to law-eaf for processing. Contracts may take up to 30 days for them to get through the university's contract and purchasing department.

Please read through the contract and make sure to note any payment dates, signing deadlines, etc. in the body of the email to law-eaf.

No payments can be made to a vendor without a fully completed contract. Please keep this in mind if there are any payment due dates outlined in the contract.

This will be most common with the invoice payment option.

Room Requests

Please complete a room request at least 10 days prior to your meeting or event.

It is important that you check the room schedule ***before*** submitting your request. Remember, classes take priority. Room schedules can be found on the [Room Calendars webpage](#) on the [Academic Admin webpage](#).

Once you have found a space, please submit the Meeting Room/Zoom Request Form on the [Academic Admin webpage](#).

When requesting a room(s), be mindful of the limited options in both locations. The class schedule is extremely full in both locations. You may be moved to a different room than originally requested. The room team will work with you as best they can – be courteous and please follow the reservation process with as much detail as possible to help the process runs smoothly!

Tabling Requests

There are tables/chairs available in each location should your group want to table for any reason.

We have 5 tables and 8 chairs in Menard and 2 tables and 4 chairs in the Front Street Building – keep this in mind. These reservations are first come, first served. Please note: if there is a large college event that needs to use the tables, your reservation may be adjusted. This will be on a case-by-case basis.

To reserve a table(s): Determine your desired date, start, and end times for when you would like to table.

1. When your date and time have been determined (we need a start <u>and</u> end time), send your request to moscowlaw-rooms@uidaho.edu for tabling requests in Menard or boiselaw-rooms@uidaho.edu for tabling requests in Front Street.

2. Your request **<u>must</u>** include:

    a. The student group name

    b. The date – or dates if a reoccurring request – you wish to reserve a table

    c. The start <u>AND</u> end time

        i. *Reservations for tabling to begin at or before 8 am PT/MT may be difficult to accommodate depending on the availability of staff. If you absolutely must begin tabling at 8 am PT/MT, indicate that in your request and the Administrative Support staff will see what they can do to make it work.*

        ii. *Reservations for tabling to end at or after 4:45 pm PT/MT may be difficult to accommodate depending on the availability of staff. If you absolutely must table past 4:45 pm PT/MT, indicate that in your request and the Administrative Support staff will see what they cand do to make it work.*

    d. And how many tables you need – if more than 1.

        i. In Menard, we have 5 tables

        ii. In Front Street, we have 2 tables

In Moscow: tabling occurs in the main classroom hallway, between the classroom entrances. Tables are now kept in the storeroom between classrooms. For your tabling reservation, Administration Office staff will pull the requested table(s) and chair(s) on the morning of your reservation. You will be responsible for setup and take down. At the end of your reservation, please return the table(s) and chair(s) to the end of the main classroom hallway next to the SBA and Dean's Corner bulletin boards. If you have questions or need assistance, please visit the temporary Administration Office (Menard 125).

In Boise: tabling occurs in the foyer between the large classrooms 107 & 114. *In Boise, your tabling reservation requires reserving the Foyer (Broad Street Entrance) on the room calendar.*

Marketing/Branding Information

When using University of Idaho College of Law marks/logos it is important to keep University branding in mind. If you plan to use College of Law marks/logos, please familiarize yourself with the brand requirements here: https://www.uidaho.edu/brand/brand-style-guide .

From the UI brand style website:

Official University Logos

The University of Idaho logomark — which includes the "University of Idaho" wordmark and the "I" — is a powerful symbol of our great university.

The university's logos and graphics are registered trademarks and should not be altered. We do not permit the development or use of alternate logos.

The vertically stacked wordmark is the preferred orientation, horizontal options are available.

The University of Idaho wordmark should never appear alone (always with the "I"), but the "I" may sometimes be used alone as a graphic element with special permission.

If you are unsure if you are meeting the requirements, or if you have any additional questions, please reach out to Joe St. Pierre at jstpierre@uidaho.edu.

All current marks/logos can be downloaded through the link above, but should your student group be in need of a new, official logo, the process for attaining one can be found here: https://www.uidaho.edu/brand/ucm/creative-services/secure/request-form/logo . Please keep in mind that this is a paid service.

More information about using Idaho Law branding, including a list of approved vendors, can be found here: https://www.uidaho.edu/brand

IT Information

Webinar vs Zoom

Webinars are like zoom calls with more control over who can be seen and heard. In a Webinar only hosts and panelists will have the ability to use their microphone and camera. Everyone else will simply be a silent viewer. There are options for Q & A so the audience can send in questions.

How to decide which is best, how to set up each.

If your event is open to the public, it should always be a webinar. This will keep people from disrupting the event. Events with a large number of participants (100+) should consider being a webinar for easier management. As of this past semester, all faculty and staff have webinar licenses on their Zoom accounts. If you need to schedule a webinar, work with your faculty advisor and they can schedule it for your event.

Purchasing Rules: What you cannot buy according to UI rules on software, surveys, etc.

There is nothing that you can buy without going through IT approval first, and then it will likely need to be purchased by IT at your expense in order to be properly managed and deployed. All software, subscriptions, and other services that have any interaction with U of I data (i.e. email, calendars, accounts, files, etc) has to be approved for use within the university by going through an IT governance review for data security and handling compliance.

If there is not a program or service currently available that meets your needs and you would like to request one, you can work with your faculty advisor and they can fill out the "I have a Technology IDEA" form linked below, to begin the IT governance review process. This needs to be filled out by the faculty advisor who is requesting the program or service and not by anyone else.
https://support.uidaho.edu/TDClient/40/Portal/Requests/ServiceDet?ID=926

How to determine if you need IT at your event.

With the changes to classroom technology standards across the university, LawTech is not able to set up events for anyone. It is the event organizers responsibility to have someone available in each location to set up their event. IT is not needed at any event but we can be available to answer questions if you are unsure how to use the technology. Ideally we would address these questions sometime before the event to make sure you are comfortable with the room capabilities before your event begins. As always if there are issues that arise during your event, you can contact LawTech for assistance.

Process to request

LawTech has a support request form on our Policies and Requests webpage linked below.
https://www.uidaho.edu/law/lawtech/policies

How to get a Teams or email for a student org

Teams and email groups can be requested by your faculty advisor by emailing LawTech. They are the ones responsible for managing the accounts and updating membership lists and will be the owners on any Team or email group created.

REMINDERS

Common Issues

Please do not 'forum shop'. The university is constantly changing rules and regulations, meaning that not everyone at the college has up to date information. If you have any questions, please contact law-eaf for accurate information.

Funding Approval Requests must be completely filled out to receive approval from law-eaf. Please pay close attention to ensure all the boxes are filled out correctly with accurate information. Items being purchased must be explicitly outlined in the summary section.

A list of UI employees at your event must be submitted to law-eaf within 24 hours following the event.

Contact Student Services Immediately IF:

There is talk of a contract.

There is any sort of travel involved.

You are thinking about soliciting donations.

You would like to give a gift.

Do's and Don'ts

DO have the club treasurer fill out the Funding Approval Request survey.

DON'T seek funding approval from anyone other than the student services team.

DO ask questions.

DON'T leave fields empty on the form and/ or be vague.

DO submit the form at least 10 business days prior to your event.

Contacts

law-eaf@uidaho.edu	
law-events@uidaho.edu	
Christy Becker, cbecker@uidaho.edu	Student Services Manager, Based in MOS
Caroline Lehner, clehner@uidaho.edu	Student Services Coordinator, Based in BOI
lawadsa@uidaho.edu	
Leon Samuels, lsamuels@uidaho.edu	Assistant Dean of Students, Based in BOI
Greg Sergienko, gsergienko@uidaho.edu	Associate Dean of Students, Based in MOS