Congratulations you’ve been elected! Now what?

- Do you have access to view your accounts?
  - Where’s your money?
  - What’s your budget?
  - How will you pay for these things?
- Are you listed as a Financial Signatory in Engage?
Do You Have Access to View Your Accounts

- In Atlas can you look at your accounts in the Cumulative or Transaction reports?
- If not email sole-desk@mit.edu and provide:
  - Your Name
  - Your Kerberos
  - The Name of your club
  - The Account numbers
Where is your Money?

<table>
<thead>
<tr>
<th>Finboard funded clubs</th>
<th>GSC</th>
<th>CSC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Account</td>
<td>Main Account</td>
<td>Main Account</td>
</tr>
<tr>
<td>F-series (7/1-12/31)</td>
<td>Funding Account</td>
<td>CSC Account</td>
</tr>
<tr>
<td>S-series</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FUNDING CYCLE TIME FRAME

- FINITE AMOUNT OF TIME TO SPEND THE ALLOCATION
  - SUMMER CYCLE: 7/1 TO 9/30
  - FALL CYCLE: 10/1 TO 12/31
  - WINTER CYCLE: 1/1 TO 3/31
  - SPRING CYCLE: 4/1 TO 6/30

GSC HAS ONLY 1 COST OBJECT FOR ALL CYCLES

FINBOARD HAS 2 COST OBJECTS: F SERIES & S SERIES
  - F SERIES COST OBJECT COVERS YOUR SUMMER AND FALL RECEIPTS-7/1 TO 12/31
  - S SERIES COVERS YOUR WINTER AND SPRING RECEIPTS
    1/1 TO 6/30
Create a Budget!

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ESTIMATED</th>
<th>ACTUAL</th>
<th>OVER/UNDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event</td>
<td>9,490.00</td>
<td>9,770.00</td>
<td>-280.00</td>
</tr>
<tr>
<td>Swag</td>
<td>1,050.00</td>
<td>928.00</td>
<td>122.00</td>
</tr>
<tr>
<td>Music</td>
<td>600.00</td>
<td>400.00</td>
<td>200.00</td>
</tr>
<tr>
<td>T-Shirts</td>
<td>935.00</td>
<td>870.00</td>
<td>65.00</td>
</tr>
<tr>
<td>Photography</td>
<td>1,625.00</td>
<td>1,575.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Decorations</td>
<td>700.00</td>
<td>720.00</td>
<td>-20.00</td>
</tr>
<tr>
<td>Food</td>
<td>900.00</td>
<td>850.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>1,345.00</td>
<td>1,075.00</td>
<td>270.00</td>
</tr>
<tr>
<td>Travel</td>
<td>100.00</td>
<td>165.00</td>
<td>-65.00</td>
</tr>
<tr>
<td>Other</td>
<td>885.00</td>
<td>1,021.00</td>
<td>-136.00</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>17,630.00</td>
<td>17,374.00</td>
<td>256.00</td>
</tr>
</tbody>
</table>
Where to find Funds?

- Sponsorships
- Gifts
- Alumni
- Dues
- Departmental
- SOLE
  - Other Opportunities
    - Arthur Smith Fund, COOP Public Service Grants, Council for the Arts, CPW Event Funding, De Florez Fund for Humor, Baker Foundation, LEF ARCARDE, Legatum Center, Mad Money, Mind Hand Heart Innovation Fund, Weekends @MIT, etc...
Receiving Outside Funds

Receiving Outside Funds

- At this time wiring Funds are the best option at this time
  - Bank name—Bank of America, NABank
  - address—100 Federal Street,
  - Boston, MA 02110
  - Wire payment ABA routing number—026 009 593
  - ACH ABA routing number—011 000 138
  - SWIFT code—BOFAUS3NDDA
  - account number—004632424694 (“MIT incoming wire”)

Wire details—name of MIT program and invoice number or account number to which the transfer should be credited

- Checks
  - Accounts Receivable/Cashier Services,
  - MIT Office of the Vice President for Finance,
  - 77 Massachusetts Avenue, NE49-4000,
  - Cambridge, MA 02139.

- Email cashier-services@mit.edu to inform VPF of expected checks and how to apply them. Expect processing times to be delayed. The current processing time is expected to be 4 weeks, but may be adjusted as circumstances change.
Event Registration

1. Log on to Atlas
2. Open Full Menu
3. Open General tab
4. Click “Event Planning”
5. Register New Event
How do you pay for these things?

- RFP’s
  - Pay vendor directly by check
  - Reimbursement for yourself or other members of the club
- Coupa or Buy 2 Pay (B2P)
  - The Institutes Procurement system
- Controlled Value Card (CVC)
  - Your group’s credit card
# ATLAS-MANAGE REIMBURSEMENT

## Purchasing

<table>
<thead>
<tr>
<th>Buying</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2P @ MIT</td>
</tr>
<tr>
<td>Close Purchase Orders - Non B2P</td>
</tr>
<tr>
<td>External (Facilities Only)</td>
</tr>
<tr>
<td>External (Outside Vendors) - Non B2P</td>
</tr>
<tr>
<td>Find Purchase Orders</td>
</tr>
<tr>
<td>Find Requisitions</td>
</tr>
<tr>
<td>Internal (MIT Services)</td>
</tr>
<tr>
<td>Requisition Creator Inbox - Non B2P</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Inboxes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Card Inbox</td>
</tr>
<tr>
<td>RFP Inbox</td>
</tr>
<tr>
<td>Requisition Approver Inbox - Non B2P</td>
</tr>
<tr>
<td>eDACCA Salary Distribution Inbox</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manage Reimbursements (RFPs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clone an RFP</td>
</tr>
<tr>
<td>Find RFPs</td>
</tr>
<tr>
<td>Payment (Taxable)</td>
</tr>
<tr>
<td>RFP Inbox</td>
</tr>
<tr>
<td>Reimbursement</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My Reimbursements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clone an RFP</td>
</tr>
<tr>
<td>Direct Deposit Preferences</td>
</tr>
<tr>
<td>My Reimbursements Inbox</td>
</tr>
<tr>
<td>Request a Reimbursement for Me</td>
</tr>
<tr>
<td>Track My Reimbursements</td>
</tr>
</tbody>
</table>
Types of RFP’s

- Payment (Taxable)
  - Payment for a vendor
- Reimbursement
  - Reimbursement for someone else
- Request a Reimbursement for me
  - Requesting a Reimbursement for yourself

RFP Checklist

1. Is this for a business, individual or yourself
2. Do you have the cost object for your club, is it correct?
3. Have you taken out sales tax?
4. Are these travel expenses? They should go in concur
5. Is this a prize payment? Have you instructed the payment winner to call Mary Mango?
6. Did you include the itemized receipt?
7. Did you send it to the Financial Signatory (even if you are one you need to send it to another)?
RFP Important information

1. Vendor name
2. Address
3. W-9 information (if it is a new vendor)
4. Mail to or pickup
5. Date of service
6. GL account (leave blank if unsure)
7. Cost object
8. Amount
9. Description
10. Itemized receipt
Coupa B2P

- Coupa or Buy 2 Pay
- The Institute’s procurement system
- Basics
  - 1. You create a **Requisition** (a request for MIT to place an order with a vendor or supplier)
  - 2. Requisition is approved and a **Purchase Order** is generated (Purchase order is a formal agreement between MIT and a supplier)
  - Supplier fills order and sends Invoice to MIT via MIT [invoices@mit.coupahost.com](mailto:invoices@mit.coupahost.com)
B2P Procedures

- Log on to B2P
- Enter “Item Description” you can enter a brief description of what you are purchasing.
- Go to supplier Enter the vendor’s name
- Price Enter the total estimated price
- Commodity Drop down menu choose the best category fit for what you are purchasing
- Add everything to your cart, then review your cart
- Attach the quote from the company or invoice to where you can attach it also click the square that indicates you have an attachment
- Go to the ship to section enter “Alternate Address”
- Scroll down to Buyer Notes and enter your shipping address
- Scroll down to the line item, You will see a magnifying glass click that, where it says cost object Enter your groups cost object or account number
- If you are listed as a financial signatory click submit for approval
- If you are not a financial signatory click “add” approvers add the name of a financial signatory from your club approve to them and contact them to approve.
Vendor Options

Vendors you can order directly from their website by clicking the tiles

Include Amazon
4imprint
Apple
Ambit press

List of preferred suppliers:
https://vpf.mit.edu/suppliers
Buy 2 Pay

Same procedure, except when you are viewing your cart you should enter the address you are sending the item to (cannot use MIT address at this time)
1. Add quotes/contracts from vendor
2. Enter on campus address (use W20-500)

3. Click the magnifying glass to enter your cost object
Controlled Value Cards (CVC)

- What is the criteria
  - A lot of small purchases, without coming out of pocket. 3k limit
  - 1 per group

- Application process
  - Provide link/show form
  - 10-14 business days time
    - When it arrives you will receive training
    - Submission portal provide the link to engage
    - Within 7 days of purchase - submit receipts
Employment

- Employing Coaches, Music Directors, Stage Directors, etc...
  - Complete Employment Agreement Form
  - Employee will upload to Engage
  - Submit to student for approval
  - Student Submits to SOLE

- Student Employment remains the same
Travel - Before your trip

- **BE SURE TO REGISTER YOUR TRIP IN ENGAGE 2 WEEKS BEFORE YOU TRAVEL, YOU WILL NOT BE REIMBURSED UNLESS YOUR TRIP HAS BEEN REGISTERED IN ENGAGE:** [https://engage.mit.edu/forms](https://engage.mit.edu/forms)

- For CSC register your travel in Do Sports Easy

- For any rental car, flight or lodging arrangements contact Ramon Downes
Travel - Your reimbursement

Log on to concur
Travel - Your reimbursements

- This form needs to be attached along with all of your other receipts to the concur submission
- THE FINANCIAL SIGNATORY AND TRAVELER CANNOT BE THE SAME PERSON

Travel Signatory Authorization
Note of Approval for Student Organization Concur Submissions

I approve the travel expenses associated with this report.

Name of Person being reimbursed: ______________________________________________________

Report Key***: ________________________________________________________________

Total Amount Approved: _____________________________________________________________

Cost Object: ______________________________________________________________________

Financial Signatory Name and Signature: ____________________________________________
Engage

- What can you do with engage
  - Update roster/officers
  - Fill out forms - register travel, CVC receipt submission, sponsorships, cashbox,
  - Find your account numbers
  - Announcements
  - Post your events
  - Engage@mit.edu
Events
  - Including posting your events

Update your organization information

Forms
Familiarize yourself with Engage

<table>
<thead>
<tr>
<th>Form Description</th>
<th>Submission Status</th>
<th>End Date/Time</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Box Request Form</td>
<td>In Progress</td>
<td>June 30, 2022 10:30 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>SAO Supplemental Funding Request Application</td>
<td>In Progress</td>
<td>February 20, 2022 12:00 AM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Student Domestic Travel Form</td>
<td>In Progress</td>
<td>June 30, 2022 2:45 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Student International Travel Form</td>
<td>In Progress</td>
<td>June 30, 2022 2:45 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Sponsorship Form</td>
<td>In Progress</td>
<td>June 28, 2022 11:45 AM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Student-Faculty Dinner/Coffee</td>
<td>In Progress</td>
<td>June 30, 2022 2:00 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>ASA New Group Application 2019-2023</td>
<td>In Progress</td>
<td>May 22, 2020 6:00 AM</td>
<td>Association of Student Activities</td>
</tr>
<tr>
<td>International Diplomatic or VIP Invitation Request</td>
<td></td>
<td>June 14, 2022 1:00 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Controlled Value Card Receipt Submission Portal</td>
<td></td>
<td>December 31, 2022 2:30 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Hackathon, Conferences, and Competition Application</td>
<td></td>
<td>July 27, 2022 2:30 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>Student Organization Financial Training 2020 Sign Out</td>
<td></td>
<td>February 29, 2020 8:45 PM</td>
<td>Student Organizations, Leadership &amp; Engagement</td>
</tr>
<tr>
<td>JDI</td>
<td></td>
<td>June 30, 2022 2:45 PM</td>
<td>Graduate HUB</td>
</tr>
<tr>
<td>MIT Coach Safety Training FY20</td>
<td></td>
<td>May 30, 2020 12:00 PM</td>
<td>MIT Athletic Training Services</td>
</tr>
</tbody>
</table>
Have you met with the staff at SOLE?

- Sign up for our office hours or email for appointments [https://www.timecenter.com/studentactivitiesoffice/](https://www.timecenter.com/studentactivitiesoffice/)
- Ethan Feuer [efeuer@mit.edu](mailto:efeuer@mit.edu)
- Jacklyn Liberman [jacklynl@mit.edu](mailto:jacklynl@mit.edu)
- Mary Mango [mmango@mit.edu](mailto:mmango@mit.edu)
- Ramon Downes [rdowunes@mit.edu](mailto:rdowunes@mit.edu)
Upcoming trainings

- RFP’s, Reports & Transfers
  - Thursday August 13\textsuperscript{th} 10am
  - Thursday August 13\textsuperscript{th} 4pm
- CVC’s
  - TBA
- Employment
  - TBA
Activity Suggestions

- Start a book club
- Create a Game
- Cook Together
- Create a scavenger Hunt
- Create an online cook book
- Create a virtual scrape book
- Solve a mystery
- Take virtual museum tours (links to Museums and other virtual tours on MITAC)
- Create a fitness challenge
- Mine Craft
- **Step-by-step doodle time!**
- **Coloring books depicting over 100 museums art collections**
- **Online art classes (15-20 minute sessions)**
- **15 Broadway plays and musicals you can watch from home**
- **Already have Netflix? If so you can enjoy movies with friends/family anywhere with Netflix Party**
- Journaling or Photo Journaling!
- Learn a new recipe with one of the many virtual cooking classes being offered online
Thank you!

- Please sign out here!