Have an idea for a student event?

- Merit funding
- Discretionary funding

Is it for/of interest to all BGS students?

Is it for/of interest to a particular graduate group?

Submit your request online:
http://somapps.med.upenn.edu/apps/form/bgsa/view.php?id=1224
7 days before the next GA meeting or 14 days before for Exec Board feedback. You will present the request and it will be voted on during the next GA meeting.

Email your program reps with an event description and total requested budget:
http://www.med.upenn.edu/bgsa/minutes.shtml

Get Funded and Enjoy the event!
I was approved, how do I get paid?

- Are you using a Penn approved vendor?
  - And are the expenses over $50?
    - Is the vendor not Penn approved?
      - And/or are the expenses under $50?
        - Purchase Order
          - □ Quote from vendor (sales tax-exempt)
          - □ Funding Request Form (signed by BGSA FC)
          - □ Submit PO# to vendor
          - □ Itemized receipt from event
          - □ Sign-in sheet from event
          - □ Deliver receipt and sign-in sheet to BGSA FC

- Reimbursement
  - □ Itemized receipt(s) (sales tax-exempt)
  - □ Sign-in sheet from event
  - □ Funding Request Form (signed by BGSA FC)
  - □ Statement of Business Form
  - □ Submit all information through Concur

BGSA Finance Chair: bgsa.finance@gmail.com

BGSA forms: http://www.med.upenn.edu/bgsa/FundingHome.shtml

UPenn Approved caterers: http://www.purchasing.upenn.edu/buyinfo/suppliers/caterers.php

UPenn Approved suppliers: http://www.purchasing.upenn.edu/buyinfo/suppliers/ben_suppliers.php
Purchase order

- Call your vendor and get a written quote.
- Tell them the quote is for a UPenn student event.
- It is exempt from sales tax but not exempt from alcohol tax.

- Email the quote and a Funding Request Form to the BGSA Finance Chair:
  - bgsa.finance@gmail.com
- At least 7 days before your event (no exceptions!).
- Electronic images of signatures are acceptable

BGSA Finance chair will respond with:
- Signed Funding Request Form
- PO number. Give the PO# to your vendors.

During the event save:
- all itemized receipts
- Sign-in sheet (with names, program and email addresses).
After the event, deliver these forms to the BGSA Finance Chair.
During the event, save all itemized receipts and a Sign-in sheet (with names, program, and email addresses.)

Within One Week after your event, e-mail the BGSA Finance Chair with receipts, sign-in sheet and Funding Request Form to BGSA Finance Chair: bgsa.finance@gmail.com
Electronic images of signatures are ok, you can leave the vendor ID blank.

The report is submitted. You should receive an email when it has been approved.

Under New Expenses, scroll down and click on Student Activities to add an expense. Fill in the relevant fields, including attaching images of itemized receipts.

Upload the following documents as "receipts":
1. Funding Request Form, with Finance Chair signature.
2. Statement of Business Form:
   1. Write expected date of graduation for the end date of your term. You MUST sign this form. Electronic signatures are acceptable.
4. Itemized receipts
Click Submit Report.

Create an expense report using Concur http://cms-prod.business-services.upenn.edu/penntravel/expense-report.html
Fill out the Report Header as follows:
- Type of Travel/Reimbursement: "4. Non-Travel Expense"
- Country Code: leave empty
- Report Name: a short description with dates (e.g., "BGSA Symposium 10/30/13")
- Report Date: leave as is – automatically generated
- Policy: "US Expense Policy"
- Business Justification: description of event with dates. Please include the phrase "Please use BGSA funding."
- Report Key: leave as is
- School/Center: use default – "(40) MED"
- CNAC-ORG-BC-FUND – Funding Source: use default.
- Program: use default.
- CREF: use default.
- Lawson AU-UPHS COA: leave empty
- Affiliation: leave as is – automatically generated
- Notes to Approver: "BGSA-approved event. Funding Request form with Finance Chair signature attached as receipt."

Click Next. You will receive a warning that reads "The student/trainee will include in the Business Justification field full detail ......" You can ignore this warning and click Next again.
## 2013-2014 Funding Events

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