



Have an idea for a student event?

Is it for/of interest to all BGS students?

Merit funding

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.



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

Discretionary funding



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](#)

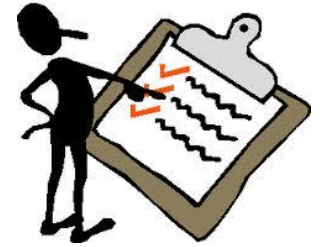
BGSA Finance Chair: bgsa.finance@gmail.com

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:

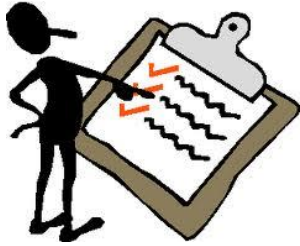
- Signed Funding Request Form
 - PO number.
- Give the PO# to your vendors.

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.

Reimbursement



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

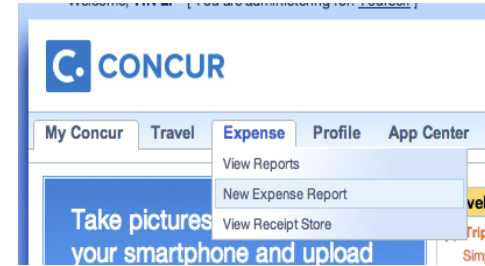
BGSA Finance Chair:

bgsa.finance@gmail.com

Electronic images of signatures are ok, you can leave the vendor ID blank.



The finance chair will reply with a signed copy.



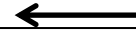
The report is submitted. You should receive an email when it has been approved.

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.
3. **Sign-in sheet.**
4. **Itemized receipts**

Click **Submit Report**.



Create an expense report using Concur

<http://cms-prod.business-services.upenn.edu/penntavel/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

2013-2014 Discretionary			2013-2014 Merit		
<u>Program</u>	<u>Budgeted</u>	<u>Description</u>	<u>GA Meeting</u>	<u>Budgeted</u>	<u>Description</u>
BMB	\$350	WiC happy hour	Sep	\$650	Penn Sci Policy Groups
BMB	\$578	BMB happy hour	Sep	\$150	Ocean Explorers Symp
CAMB	\$131	Gene patenting Discussion	Sep	\$200	Microbiome JC
CAMB	\$150	Tumor immunology	Oct	\$140	Neurodegenerative Dz JC
CAMB	\$300	Microbiome JC	Oct	\$225	Center for Neuro JC
CAMB	\$2,000	Phillies game	Oct	\$500	Chemistry Symposium
CAMB	\$450	WiC happy hour	Oct	\$195	Kickball Team
Epi/Biostats	\$174	Dinner	Nov	\$150	Immunology-Cancer JC
Epi/Biostats	\$458	Happy hour	Nov	\$180	EE Just seminar alcohol
GCB	\$70	GCB hackathon	Dec	\$550	Penn Med Art Show
GCB	\$30	GCB hackathon 2	Feb	\$225	Center for Neuro JC
GCB	\$205	GCB end-of-year bbq	Mar	\$500	Hill Visit Day
GCB	\$227	GCB social	Mar	\$200	Brain Awareness Week
IGG	\$377	IGG/PGG happy hour	Apr	\$600	Penn Biotech Investment Club
IGG	\$103	Prelim celebration - pinata treats	Apr	\$525	Women in Chemistry
IGG	\$351	IGG/PGG bbq	Apr	\$120	Kickball Team
Neuro	\$150	Age-related JC	Apr	\$400	PGWISE Alumni-Student Luncheon
Neuro	\$500	NGG Recruit	Apr	\$200	EE Just Spring Seminar
Neuro	\$464	NGG Biopond Party			
Pharm	\$390	Happy hour with recruits			
Pharm	\$291	IGG/PGG bbq			