



STUDENT GOVERNMENT ASSOCIATION
The UNIVERSITY of OKLAHOMA HEALTH SCIENCES CENTER

2021-2022 Spending Guidelines

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Acceptable Uses of Funds

Some acceptable uses of Student Government Association Funds are:

- **Advertising.** The ad must pertain directly to your organization and must include the three statements listed on page 5 of this booklet.
- **Banners** promoting a university event or your organization.
- **Decorations** such as streamers & balloons.
- **Food** for meetings, dinners or events within the allowed policy limits listed on page 5 of this booklet.
- **Office supplies.** Staples and Amazon are the university approved suppliers. HSC Student Affairs can order for you.
- **Postage** must be metered by OUHSC. HSC Student Affairs can help.
- **Printing** provided by University Printing Services. If you use an outside vendor, prior approval from HSC Student Affairs is required.
- **Refreshments** at student events within the allowed policy limits listed on page 4 of this booklet.
- **Rental of facilities and equipment** for student events. Most rentals require a contract and signature. All contracts **MUST** go through our Purchasing Department. Please contact the Senior Accountant for HSC Student Affairs prior to making reservations.
- **Rental of traditional international costumes** for cultural events. Rentals are considered a service so a PO is required. Contact the Senior Accountant for assistance.
- **Security** for events requires an approved Independent Contractor Form if provided by an individual and always requires a purchase order. Please contact the Senior Accountant for HSC Student Affairs for assistance.
- **Services** provided by DJs or performers require an approved Independent Contractor Form prior to the event if provided by an individual. All services require a Purchase Order prior to an event. Please contact the Senior Accountant for HSC Student Affairs for assistance.
- **Transportation** for educational trips pertaining to your organization.

Non-Acceptable Uses of Funds

The following list includes some of the ways Student Association Funds cannot be used:

- **Appliances**
- **Clothing**
- **Donations**
- **Endorsements**
- **Fundraising**
- **Gifts, cards, gift cards, prizes, door prizes, or personal items.** This includes t-shirts, awards or any kind of give-away.
- **Holiday decorations**
- **Medications**
- **Memberships**
- **Monetary awards**
- **Postage purchased at the Post Office.**
- **Religious services**
- **Scholarships**

Ways to Access Funds

Four methods of spending your organization's budget allocation are:

Purchase orders are required for purchases that require a signed contract or agreement, are for a service, or are greater than \$5000. Contact the HSC Student Affairs Senior Accountant for more information.

Transfer of funds can be beneficial when you are paying another campus department or splitting an invoice. HSC Student Affairs can help with the process.

Direct payment – If a company is in the OUHSC supplier/vendor system, they will invoice the university. After the goods or services are received or rendered, the vendor can be paid by OUHSC. The invoice should be mailed, faxed, emailed or delivered to the HSC Senior Accountant. (Address information is on page 7.) Direct billed invoices should not include sales tax.

Reimbursement is the most common method of accessing funds. You or your organization can be reimbursed when personal funds or funds from the organization's bank account have been spent for acceptable purchases.

In order to be reimbursed for expenditures, you must:

1. Obtain an itemized receipt that shows the name and address of the vendor, the date of purchase, items purchased, and proof of payment (a zero balance, credit card receipt, etc.).
2. Complete an Expenditure Authorization form which includes the purpose and date of the event, the amount of the expenditure, and if you purchased food, the number of people participating in the event. The names of attendees must be listed if there were ten or less. The organization's adviser must sign the Expenditure Authorization.
3. Submit the receipt and other required information to the HSC Student Affairs Senior Accountant who will assist you in completing a Form 3 and notarize your signature. Form 3 is provided on page 6 of this booklet for your information and is available on the OUHSC website. The link is http://www.ouhsc.edu/financialservices/documents/AP_forms/OSF3.pdf

NOTE 1: If you have not previously received a check from OUHSC or are not set up as a supplier, you must be added to the Supplier system. You can request to be added by emailing or calling the Senior Accountant. You will receive an electronic request for information necessary to become a Supplier so that you can be reimbursed.

NOTE 2: Reimbursements must be made within 120 days; otherwise, they can become taxable income to the payee.

NOTE 3: Air travel requires preauthorization. Please ask for help **before** you make reservations.

Tips for Success

Registered Student Organizations are not entities of the University, and their activities are not sponsored or endorsed by OUHSC. Therefore, **RSO's are not Tax Exempt** or eligible to use the University's tax ID number.

T-Shirts can be allowable purchases if the shirt identifies the organization or event and will be used as a uniform.

Trophies and awards can be presented in honor and acknowledgment of academic or other achievements. The awards must be reasonable and customary and not exceed \$100 per honoree.

Food purchases must be reasonable and customary and including tips, tax and service charges may not exceed the following dollar amounts:

Light refreshments:	\$25 average per person
Breakfast:	\$25 per person
Lunch:	\$40 per person
Evening meal:	\$80 per person

If your organization has **self-generated funds** (such as from a fundraiser or membership dues) that have not been comingled with University funds, those monies may be used to make otherwise unallowable purchases. For example, if you wish to do a football ticket giveaway, or provide door prizes, or give an award for attendance, you could not do that with Student Association funds, but you could with truly self-generated funds that are not comingled with University funds.

All **printed materials** must include the following three statements:

1. Funding for this publication is provided by the OUHSC Student Government Association.
2. For accommodations on the basis of disability, call (phone number).
3. The University of Oklahoma, in compliance with all applicable federal and state laws and regulations does not discriminate on the basis of race, color, national origin, sex, sexual orientation, genetic information, gender identity, gender expression, age, religion, disability, political beliefs, or status as a veteran in any of its policies, practices, or procedures. This includes, but is not limited to: admissions, employment, financial aid, and educational services. Inquiries regarding non-discriminations policies may be directed to: Shaniqua Crawford, University Equal Opportunity Officer and Title IX Coordinator, 405-325-3546, scrawford@ou.edu or visit ou.edu/eoo.



HSC STUDENT AFFAIRS
The UNIVERSITY of OKLAHOMA HEALTH SCIENCES CENTER

EXPENDITURE AUTHORIZATION

Person to be reimbursed/Vendor to be paid _____

Student Organization _____

Event or purpose of expenditure _____

Was this event posted on the Student Calendar? (circle one) YES NO

If not, why? _____

Amount of expenditure _____ Date of activity _____

If food, number of participants _____ If 10 or less, please list names.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Student Org Treasurer (if required) _____ Date _____

Advisor/Sponsor (required) _____ Date _____

Please submit along with receipts for reimbursement or invoice to be paid to:

Katherine Cooley | Senior Accountant
HSC Student Affairs | HSC Student Union, Suite 300
katherine-cooley@ouhsc.edu | Fax: (405) 271-8817

Reset Values

OSF FORM 3
(Revised OSF 10/03 OUHSC 12/11)

AGENCY BUSINESS
UNIT

Univ of Okla
Hlth Sci Ctr

CLAIM OF:
TITLE:
EMPLOYEE ID:
MAILING ADDRESS: (Required for non-employees)

STATE OF OKLAHOMA

Notarized Claim Voucher And
Disbursements of Payroll
Withholdings

FOR AGENCY USE:

OBJECT ACCOUNT	AMOUNT	OBJECT ACCOUNT	AMOUNT

FOR
\$ 0.00
AGAINST

Agency, Bd.,
Comm., Dept.:

ASSIGNMENT

I hereby assign this claim to:
Vendor ID: _____
Name: _____
and authorize the State Treasurer to issue a warrant in payment to said assignee.

TOTAL AMOUNT \$ 0.00

OSF-AUDITED BY: _____

Claimant Signature _____ Date _____

DATE	ITEM	QUANTITY	ARTICLE	UNIT PRICE	AMOUNT CLAIMED	OBJECT ACCOUNT
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	

THIS SECTION IS NOT REQUIRED FOR WITHHOLDING PAYMENTS- EXCEPT FOR WITHHOLDING REFUNDS

TOTAL AMOUNT APPROVED \$ 0.00

The undersigned contractor, vendor, individual, or duly sworn agent, of lawful age, upon oath says that this claim is true and correct. Affiant further states that the work, services, or materials as shown by this claim have been completed or supplied in accordance with the plans, specifications, orders, requests, and all other terms of the contract. Affiant also states that any refunds represented by this payment are due. (NOTE: Claimant signature only for payroll withholding refunds)

_____ Claimant

State of _____ County of _____

Subscribed and sworn before me _____,

My Commission expires _____,

Notary Public (or Clerk or Judge) _____

I certify that I am of greater level of institutional authority and completely independent from the individual being reimbursed.

_____ Approval Signature

_____ Approval Printed Name

_____ Title

_____ Date

Contact Information

HSC Student Government Association

Arjun Nanda, Treasurer (arjun-nanda@ouhsc.edu)
Jayden Sarabia, President (jayden-sarabia@ouhsc.edu)

HSC Student Affairs

Katherine Cooley, Senior Accountant (katherine-cooley@ouhsc.edu)
HSC Student Union
1106 N. Stonewall Suite 300
Oklahoma City, OK 73117-1209
(405) 271-2416 (Ext 48805)
(405) 271-8817 (fax)

HSC Accounts Payable

Dianna Rustin, Accounts Payable Assistant Manager
(dianna-rustin@ouhsc.edu)
(405) 271-2410

HSC Student Government Association
1106 N Stonewall Suite 300
Oklahoma City, OK 73117

Helpful Hints for HSC Student Organizations

- An organization's advisor/sponsor must approve every expenditure. The form is provided in the Guidelines for Spending booklet and must be submitted with requests for reimbursement or invoices for payment.
- HSC Student Association monies cannot be used in any way for fundraising or giveaways.
- Receipts for reimbursement must be itemized with the name and address of the vendor, the date of purchase, items purchased, and show that they have been paid.
- The number of participants must be provided for food purchases, and if 10 or less, names must also be provided.
- Requests for reimbursement should be submitted to the HSC Student Affairs Senior Accountant timely. Reimbursements over 120 days may be designated as taxable income.
- If your expenditure doesn't clearly fit the Acceptable Uses of Funds criteria in the Spending Guidelines booklet, contact the Senior Accountant BEFORE you spend the money.
- All printed materials must contain these three statements:
 1. Funding for this publication is provided by the OUHSC Student Association.
 2. For accommodations on the basis of disability, call (phone number).
 3. The University of Oklahoma, in compliance with all applicable federal and state laws and regulations does not discriminate on the basis of race, color, national origin, sex, sexual orientation, genetic information, gender identity, gender expression, age, religion, disability, political beliefs, or status as a veteran in any of its policies, practices, or procedures. This includes, but is not limited to: admissions, employment, financial aid, and educational services. Inquiries regarding non-discriminations policies may be directed to: Shaniqua Crawford, University Equal Opportunity Officer and Title IX Coordinator, 405-325-3546, scrawford@ou.edu or visit ou.edu/eoo.

Contact Information

Katherine Cooley | Senior Accountant
OU Health Sciences Center | HSC Student Affairs
1106 N Stonewall, Suite 300 | Oklahoma City, Ok 73117
405-271-2416 x 48805 | 405-271-8817 (fax)
Katherine-cooley@ouhsc.edu