

How to Submit a Funding/Purchase Request in Hopkins Groups

Navigate to your organization's page

The image shows a three-step navigation process in a web application. Step 1: In the 'GROUP SECTION' sidebar, the 'Money' menu item is circled in blue, with a blue arrow pointing to it from the text '1. Click Money'. Step 2: The 'Money' dropdown menu is open, showing options like 'Accounting Book', 'Budgeting', 'Online Revenues', and 'Download'. 'Budgeting' is circled in blue, with a blue arrow pointing to it from the text '2. Click Budgeting'. Step 3: The 'Create Budget Request' button is circled in blue in the top right of the main content area, with a blue arrow pointing to it from the text '3. Click Create Budget Request'. The main content area also shows a 'Filter By' dropdown set to 'Test Organization - Fina...' and a 'Download Report' button.

GROUP SECTION

- Dashboard
- Activity
- Settings
- Officers 7
- Group Page
- Reports
- Members >
- Emails >
- Events >
- Surveys & Forms >
- Website >
- Money**

Money

- Accounting Book
- Budgeting**
- Online Revenues
- Download

Admin Settings View All Groups **Create Budget Request**

Filter By Test Organization - Fina... Download Report

1. Click Money

2. Click Budgeting

3. Click Create Budget Request

Funding Request

Budget - bARTimore at Hopkins

Admin Settings View All Groups **Create Budget Request**

Student Government Association Allocation FY21

Filter By bARTimore at Hopkins Download Report

1. Select FY21 SGA Allocation

2. Select Create Budget Request

Create/Edit a Budget Request (Step 1 / 2)

The SAC Annual Allocation Process will run from March 1, 2020 through March 13, 2020. Please complete the excel document and upload it. Please refer to the 2020-2021 SAC Guidelines for details.

Budgets that request funding for items that can not be funded though SAC will be reject and asked to be resubmitted. Blank documents will not receive consideration.

If you have questions about this process please do not hesitate to contact sac@jhu.edu

* Budget Request Type SGA/SAC Funding Request

Title Event/Initiative Name

Comments

* Documents

Upload

3. Select SGA/SAC Funding Requests

4. Upload Budget Excel Form

5. Select Next

Event/Initiative Name

Field required.

Close

Next

Funding Request Continued

- On this page you will need enter the total amount needed for each budget item type.
- If you have more than one item type please select “add item”.
- You will be able to add all items for each event on the same request.

Enter Budget Items (Step 2 / 2)

Independent Contractor and Non-JHU Professional Services Annual Cap: \$4500
JHU Professional Services Annual Cap: \$2000
Non-Reusable Items Annual Cap: \$500
Reusable Items / Supplies & Equipment Annual Cap: \$1500
Registration Fees (Professional Development) Annual Cap: \$1500
Registration Fees (Competitions) Annual Cap: \$1000
Food Annual Cap: \$1500
Travel Annual Cap: \$1500
Printing Annual Caps include: Bound Publications: \$2000
Advertising Annual Caps include: Social Media Promotion/Online Presence: \$100

Item Type	Amount Requested	Amount Financed By Group	Total Funds Needed	Notes
Independent Contra... ▾	\$ 0	\$ 0	\$ 0	Notes
Total	0.00	0.00	\$0	

+ Add item

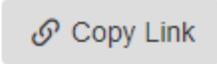
Back

Next

Click Next

Funding Request Continued

 Student Activities Commission
Annual Allocation **PENDING APPROVAL**

 Edit  Copy Link  Manage

SAC Annual Allocation

Please upload your annual allocation detail sheet.

 Upload file

If you do not wish to answer the mandatory survey above, [please click here to leave the group.](#)

 Save As PDF  Save

- Click “Save”
- Once you click save, you will see “Pending Approval”

Funding Request Continued

Once submitted this is what you will see on the budget screen.

This is an indication that your funding request has been successfully submitted.

#ID	REQUEST	BUDGET ITEMS				APPROVAL			PAYMENTS - Approve Requests						
28022	Event/Initiative Name   SGA/SAC Funding Request Submitted By  Calvin Smith Jr Sep 18, 2020 12:51 AM  Blank_Document Form  Student Activities Commission Annual Allocation	Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes		#ID	Create Date	Total Payment Requested	From Approved	From Group Funds	Remaining Balance	
		Independent Contractor & Non JHU Professional Services	100.00	0.00	100.00				+ Request Payment						
		Event	250.00	0.00	250.00				+ Request Payment						
		Total	\$350.00	\$0.00	\$350.00	0.00	<input type="checkbox"/> Done 		Total	\$0.00	\$0.00	\$0.00	\$0.00		

Funding Request Continued

Once SGA has approved your funding you will be able to see the amount approved and the payment request button will be active.

You can then select the appropriate "Request Payment" button and submit your payment request

#ID	REQUEST	BUDGET ITEMS				APPROVAL			PAYMENTS - Approve Requests				
		Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes		#ID Create Date	Total Payment Requested	From Approved	From Group Funds	Remaining Balance
28022	<p>Event/Initiative Name SGA/SAC Funding Request</p> <p>Submitted By Calvin Smith Jr Sep 18, 2020 12:51 AM Blank_Document</p> <p>Form Student Activities Commission Annual Allocation</p>	Independent Contractor & Non JHU Professional Services	100.00	0.00	100.00	100.00				<input type="button" value="+ Request Payment"/>			
		Event	250.00	0.00	250.00	150.00				<input type="button" value="+ Request Payment"/>			
		Total	\$350.00	\$0.00	\$350.00	250		<input type="checkbox"/> Done	Total	\$0.00	\$0.00	\$0.00	\$0.00

Purchase Request

- Once you click the “Purchase Request” button you will navigate to this screen.

DETAILS

* Payment Type

* Description
Ex: food, marketing materials, travel expenses, etc

AMOUNT

Revenue/Expense

* From Allocated
Numbers only

* From Group Funds
Numbers only
Use funds from your group money balance

ADDITIONAL INFORMATION

* Receipts

* Payee / Vendor
Who is being paid or who is making the deposit (ex: a vendor name, a student name, etc)

* Additional Notes

- Fill out the appropriate information and hit “Next”

Purchase Request Continued

- You will navigate to the Purchase Request Form.
- This is very similar to the form utilized on the old system.
- You must complete the entire form and submit your signature at the end in order for SLI to process your purchase request.

🇺🇸 Budget & Payment Request Details ⌵

📄 Purchase Request Form **DRAFT** Edit Copy Link Manage

Request Details

Request Details

Organization Name *

Organization Category (Click all that apply) *
(Maximum authorized answers: 2)

- SGA/SAC
- Cultural & Identity
- Sports Club
- Graduate Organization
- Whiting School of Engineering Advising
- Programming Board
- Religious and Spiritual
- Fraternity and Sorority Life
- All other RSOs

Cost Center/Internal Order Number *

Purchase Category *

Purchase Request Continued

Once the Purchase Request is submitted, it will show up here on the original approved funding request.

#ID	REQUEST	BUDGET ITEMS			APPROVAL			PAYMENTS - Approve Requests					
27972	<p>Payments</p> <p>SGA/SAC Funding Request</p> <p>Submitted By</p> <p> Calvin Smith Jr Sep 17, 2020 4:04 PM</p> <p>Form</p> <p>Student Activities Commission Annual Allocation</p>	Name	Total Funds Needed	Financed By Group	Requested	Approved	Notes	#ID	Create Date	Total Payment Requested	From Approved	From Group Funds	Remaining Balance
		Independent Contractor & Non JHU Professional Services	965.00	0.00	965.00	965.00		#2390521	Sep 17, 2020	-965.00	-965.00	0.00	0.00
		Total	\$965.00	\$0.00	\$965.00	965.00	Done	Total		-\$965.00	-\$965.00	\$0.00	\$0.00

How to check your submission status

1. Click Home

2. Click My Surveys

3. View where your submission is in the approval process.

Submission Title	Status	Updated on	Steps
Student Activities Commission Annual Allocation Hopkins Groups	PENDING APPROVAL	Sep 17, 2020 5:28 PM	<ul style="list-style-type: none">Budget ReceivedBudget Reviewed and Amounts AllocatedMoney Transferred
RSO Finance 101 Training 2020 - 2021 Attendance & Evaluation Student Leadership and Involvement		Sep 15, 2020 3:07 PM	
Event Registration Hopkins Groups First General Body Meeting (Sun, Sep 22, 2019 at 8:00pm - 9:00pm)	APPROVED	Aug 26, 2020 8:52 AM	<ul style="list-style-type: none">Submission ReceivedFinal Approval
Event Registration Hopkins Groups Baltimore Mural Tour (Sat, Nov 2, 2019 at 12:00pm - 2:00pm)	APPROVED	Aug 26, 2020 8:50 AM	<ul style="list-style-type: none">Submission ReceivedFinal Approval

Questions or Feedback?

Please contact Student Leadership and Involvement at
SLIFinance@jhu.edu.