

Club Treasurer How-to Guide

for SA online requisition/voucher submission and approval

Step 1: Making a Requisition

Log into the SA Link website through the link in <http://mysa.oneonta.edu>. Once logged in, proceed to the Financial Accounts & Requests tab at the top of the site. Choose the organization that you wish to requisition from in the drop-down box and click the link 'Financial Requests' below it. In the box entitled 'Manage Financial Requests' click the link in the lower right hand corner called 'New Purchase Request>>'. Fill out the information on the page that follows, including a detailed description, correct line to be drawn from, correct category and payee information. The Subject should be specific about the request. Once finished, click submit. Contact your advisor from here to inform them that they need to approve the requisition.

Step 2: Obtain receipt/Invoice/Contract

You will receive an e-mail once your requisition is approved. This stage is different for each requisition, depending on which category of payment you choose during stage one. Following is a description of each category*:

Charge Cards: If you asked to use one of the charge cards (Home Depot, Wal-Mart, Office Max), please stop by the SA office during normal office hours to pick up the appropriate card and tax-exempt information. Return receipts to the office with the charge card and we will process the remainder of the request for you.

You can also use our Debit Card to make an online purchase or to book a hotel. To book a hotel please come to the office during normal office hours with a completed "Hotel Request Form". To make a purchase online you must put in a request to use the card and once it is approved you can come to the office and the secretary will help you make your order. This card is for club use only.

Contractual Agreement: If you are paying for a contractual agreement, make sure the Director of Campus Activities signs the contract.

*****Please bring all invoices/contracts to the office with a printed approved requisition*****

***for a complete list of definitions for categories, see attached 'CATEGORIES' sheet.**

If you have any further questions please contact Joe Karpel via e-mail at joekarpel@gmail.com or by phone (x2433).

