New Organization Information Packet

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Instructions on obtaining an EIN and Cost Center:

Things you will need in order to obtain a Cost Center:

- Organization currently registered and in good standing 2015-2016?
- EIN (Employer Identification Number) NOTE: If you are not sure if your organization has an EIN, please contact Carol Hogan Kindred @carol.hogan@utsa.edu or call 210-458-2816 prior to applying.

Why does the student organization need an EIN?
All student organizations with on- or off-campus banking accounts, or those requesting funds from Leader Fund, must obtain an EIN. UTSA will not issue a check, purchase order or Local Funds Voucher to a student organization without an EIN. Every student organization must have an EIN.

1. **How to apply for an EIN?**
   - On-line: Go to the website (irs.gov) do a search for “apply EIN online”. Follow the directions outlined on the website to apply on-line for an EIN.
   - Telephone: Go to the website (irs.gov) do a search for “Form SS-4”. Print and complete the form (Form SS-4), then call 800.829.4933. They will walk through the remaining steps in the process.
   - Mail: Go to the website (irs.gov) do a search for “Form SS-4”. Print and complete the form (Form SS-4), then mail to EIN Operation, Philadelphia, PA 19255. The IRS will send your EIN via mail within four weeks.
   - Fax: Go to the website (irs.gov) do a search for “Form SS-4”. Print and complete the form (Form SS-4), then fax it to the EIN Operation (Fax Number: 215.516.3990). IRS will respond with EIN within five days.

2. **How to Complete Form SS-4, Application for EIN**
   The following is what a normal non-profit student organization would need to complete on the form. The other sections are not needed to complete.
   - Line 1 Enter the name of the organization
   - Line 2 Enter the name of the organization only if different from line 1.
   - Line 3 N/A, if for banking purposes only
   - Line 4a/b Enter your mailing address (normally it is One UTSA Circle, San Antonio TX 78249)
   - Line 5a/b Enter only if different than mailing address
   - Line 6 Bexar County, Texas
   - Line 7a/b Most student organizations mark N/A
   - Line 8a Most student organizations mark No
   - Line 9a Other nonprofit organization, specify “Student Organization”
   - Line 9b N/A
   - Line 10 Check one box. Most student organizations mark “banking purpose” and specify “Open Account”
   - Line 11-17 N/A
   - Line 18 Check “Yes” if you previously applied for an EIN. Otherwise, check “No”

3. **For questions regarding how to register for EIN number or any tax related questions, please contact the IRS at the available contact information located on the irs.gov website.**

4. **Once you have obtained your EIN for your organization please log into www.utsa.edu/rowdylink to submit a request to create a cost center. The Cost Center request form can be found at:** https://utsa.collegiatelink.net/organization/sa/availableforms

4. **Under forms – click on Cost Center - New Set-up - Request Form 2015-2016.** Once you have completed the form, press submit. Once the form is submitted it will be directed to a Student Activities staff member and you will get a message in RowdyLink when your cost center is set up and ready to use. Your cost center information will also be updated on your organization’s RowdyLink profile for your quick reference and convenience.

   Please note that the new cost center can take up to 2 weeks to receive.
Steps on RowdyLink to Apply for a Cost Center Account

Step 1: Log into RowdyLink
- www.utsa.edu/rowdylink
- Use abc123 and password

Step 2: Click Student Organizations
- Type “OSA” into the search bar
- Click GO

Step 3: Click on the Office of Student Activities Page

Student Activities (OSA)
Student Activities seeks to foster a community where all students complete their education and develop into leaders through involvement in purposeful, innovative experiences facilitated by student development experts.

Step 4: Click on Forms (left hand side of the page)
- On the right hand side of the page a list of forms will pop
- Click the “Cost Center-New Set-up- Request Form 2014-2015”
Step 5: Fill out the form and submit

NOTE: MUST HAVE EIN NUMBER FROM THE FEDERAL GOVERNMENT BEFORE AN ORGANIZATION CAN SUBMIT

Cost Center - New Set-up - Request Form 2014-2015

Before completing this form, you must obtain a Federal EIN (Employee Identification Number). More information about this process can be found under Documents on the Student Activities page in RowdyLink.

Student Organization Name (full name, not abbreviations) (required)

Federal EIN (required)

Name of Person Completing Form (must be primary contact of organization) (required)

Contact email address (required)

☐ Statement of Agreement: As the primary office of the above listed organization, I am requesting an on-campus account. All of the authorized representatives (and faculty/staff advisor), understand the responsibilities associated with an On-Campus Account as described in the Student Organization Handbook. We also understand that only those who appear on RowdyLink as Authorized Representatives can sign for account charges. We further understand that if charges are made to the account without the appropriate funds being available, the Student Organization’s privileges may be revoked until funds have been deposited into the account to cover the charges. (required)

We also understand that we have the option to give the faculty/staff advisor access to the student organization’s on-campus account. At any time we may change their access, but at this time we wish to have the following in place for the faculty/staff advisor (please check one).

☐ May have access to make charges to the account.

☐ May not have access to make charges to the account.
General Requirements for Posting Banners

Checklist:

- Banners may be 6 feet high by 8 feet wide or 8 feet high by 6 feet wide in the SB, MH, and JPL.

- Banners may be no larger than 3 feet wide by 4 feet high on the UC railing in the UC North stairwell.

- One banner per student organization or department, per event, per building is allowed.

- All materials are approved for a posting period not to exceed two weeks.

- Materials promoting an event or activity must be removed by the sponsoring organization within 48 hours after the conclusion of the event or activity.

- **Banners displayed in the UC North stairwell** must be event/meeting specific (no announcements/congratulations) and must include event title, date, time, and location. Tape cannot be used to hang banners on UC railing.

- Banners displayed in any outside location must have either a wax or vinyl backing to prevent any color bleeding onto the building (JPL area).

- **No glitter** may be used on any banners in any location.

- All banners must have contact information (email address, phone number and or website) located on the banner in order to be approved for posting.

- Student Activities Staff must log all banners in the Banner Log Book along with location of banner.

- **If a poster is expired and removed by the Office of Student Activities, a student employee will email the organization to pick up the poster. If the poster is not picked up by the Friday of the week contacted it will be recycled.**

Updated 02/20/15
General Requirements for Posting Flyers

Checklist:

- Student Organizations may have one flyer on each general posting board with Meeting Times/Days/Location up for an entire semester.

- Students/Student Organizations must supply their own copies of flyers to post.

- Students/Student Organizations can post up to 27 flyers at Main Campus and Downtown Campus. One flyer will be kept in the Flyer Log Notebook in Student Activities. (Organizations make their own copies, we do not make copies for them)

- Flyers must obtain Event Name/Purpose on their flyer along with contact information (Examples: phone, email, website)

- No flyers can be posted if the event/activity is located at an establishment where 51% or more of sales are alcohol.

- Students may post flyers for selling an item or service (textbook/tutoring, etc). Individual must show Student ID in order for flyers to be approved.

- Each flyer must be stamped by Student Activities upon approval for posting.

- All postings can only be approved for a posting period not to exceed two weeks.

- Flyers can only be posted in General Posting areas (there are signs that say General Posting). Any flyers placed in an area not for General Posting will be removed and trashed/recycled.

- Student Activities Staff must log ALL flyers in the Flyer Log Notebook.

Updated 02/20/15
Graphics Room Use

Organization Representatives may use the Graphics Room for two (2) hours a day to create banners for their organizations.

Organization Representatives are responsible for the materials in the room. If the graphics room is misused, the organization and representative can be held responsible and the organization can lose Graphics Room privileges.

Please follow these steps:

1. Come to Student Activities to check out the key; you will be required to leave a form of identification.
2. Hang paper from the corkboard, using pushpins. Do not hang paper from any other wall using any other method.
3. Use only pencil to trace on butcher paper.
4. Place the paper on the floor to use paints and markers. Do not use paints or markers on walls; they will bleed through the paper.
5. Do not remove any equipment or supplies from Graphics Room.
6. Throw away all trash before leaving.
7. Return room key to Student Activities.
8. Any damage done to the room during the reservation period will be the responsibility of the organization.

If there are issues with the Graphics, call/email Lydia immediately to notify her of the issue. Include the Name and Contact Information.
State Mandated Risk Management Training

Two Student Leaders from each organization attend and record attendance at Risk Management Training offered by the Office of Student Activities. (Students may only represent up to two organizations each academic year for this training.)

Organization Advisor must attend a separate Risk Management Training offered by the Office of Student Activities.

SMRMT Dates (for students):

**Student Dates**
- Monday, September 28, 2015, 4:30 PM to 6:30 PM, UC Retama Auditorium
- Tuesday, September 29, 2015, 4:30 PM to 6:30 PM, UC Retama Auditorium
- Wednesday, September 30, 2015, Downtown Session FS 1.402 Time: 2-4pm
- Thursday, October 1, 2015, 2:30 PM to 4:30 PM, UC Retama Auditorium
- Friday, October 2, 2015, 2:30 PM to 4:30 PM, UC Retama Auditorium

**Advisor Dates:**
- Wednesday, October 7, 2015, 1:00 PM to 2:30 PM, HUC Bexar Room
- Wednesday, October 14, 2015, 1:00 PM to 2:30 PM, HUC Bexar Room
- Wednesday, October 21, 2015, 1:00 PM to 2:30 PM, HUC Bexar Room

For questions contact:
Jarvis Clark
Associate Director of Student Activities
jarvis.clark@utsa.edu
210.458.4160
How to Reserve Space

Major events (large, multi-space, outdoor, etc.) require a planning meeting and should be requested at least one month prior to event for optimal coordination.

Registered Student Organizations Note: Student organizations are allowed up to three (3) authorized requestors who may book space on the Main Campus. Each requestor must take the EMCS RSO Event Workshop, annually. Workshops are now available online. Complete an authorized contact form at the EMCS front desk.

Step 1: Determine your space needs and which space most appropriate for your meeting or event.

Step 2: Get specific information about the space you would like to request – does this space work for your event? Do you have an alternate plan?

Step 3: Consider what types of activities are allowed in this space. Will there be food, guest speakers, external co-hosts, candles, etc.? Check policies on the EMCS website.

Step 4: Who reserves the space? Is prior approval needed? Check the UTSA Space Contact Directory.

Step 5: Is the time and location available for your event? Check the UTSA Calendar "Plan an Event" availability page to be sure that the space you've selected isn't already reserved.

Step 6: Is it too early to schedule this space? Check Scheduling Considerations and Priority Scheduling Dates.

Step 7: Are you ready to make a request for your meeting/event? Make a Reservation using the online request form, for the appropriate scheduler for the facility you've researched.

Step 8: Follow the directions in the confirmation email, complete any additional paperwork & diagrams. Still have questions? Don't hesitate to contact us at 210.458.4155 or e-mail us at EMCSEvents@utsa.edu.

Information from http://utsa.edu/events/event-scheduling/reserve-space.html
UTSA Leaderfund Fact Sheet

What is it?

Leaderfund is a reimbursement program. It is designed to provide financial support for Registered Student Organizations (RSOs) that host events or participate in activities that provide leadership or learning opportunities for students or contribute to an increased sense of campus community. Reimbursement is allocated at the discretion of the Student Government Association finance committee.

Put Simply?

Your organization pays for an event, and, if the event is good for the student body, you are reimbursed AFTER the event at the discretion of SGA’s finance committee.

Do we qualify?

- Your RSO must be registered with Student Activities and in good standing with the university.
- Your RSO must have an ON-CAMPUS account with Student Activities.
- Planning and implementation of your event must be exclusively student-run.
- Your RSO must submit your application within 30 days of the activity occurring.
- On-campus activities must be open to all UTSA students.
- If a person in your organization is receiving funds to attend a conference or off-campus event, they must be a registered student in good academic and disciplinary standing.
- Your RSA has to have ORIGINAL receipts of all expenditures.
- Receipts must be in before August 15th to meet the end of the fiscal year.

How much can we get?

An RSO can be allocated up to $750 per academic school year.

Anything Leaderfund doesn’t cover?

- Food/beverages of any kind
- BestFest or Fiesta UTSA booth fees and supplies
- Individual expenses (must be an RSO)
- Day-to-day operations
- Organization start-up costs
- Expenses incurred by UTSA faculty/staff
- Fundraising activities
Gifts or loans of any kind
Off-campus advertising
Support of any political candidate or campaign
Per diem allocations
Gas/fuel costs

How do we apply?

1. First, put on an event or activity; you will have to pay the original costs.
2. Before you apply, make sure you have these things to speed up the process:
   - A representative we can contact (phone/email)
   - Your on-campus account number
   - Your event name, date, and location
   - The amount you are requesting and a breakdown of those costs
   - A summary of your event (in a word document)
   - A one-page letter of support from your advisor about the event
   - Scans of your original receipts (These will be used to process the application, and we will need the physical copies later on)
3. Apply on Rowdy Link. To get to the application:
   - Log into rowdy link using your abc123 ID at utsa.collegiatelink.net
   - Click the “Organizations” link
   - Find and click “Student Government Association (SGA)”
   - On the lefthand side of the SGA page, click the “Forms” tab
   - Click the “Leaderfund Request Form”
   - Fill out all necessary steps, and submit request

The application is submitted. Now what?

Your online application will be processed by SGA. We will contact you to schedule a hearing with the finance committee. At that point, we will collect the hard copy of your receipts. We will ask you some questions about your RSO’s event and make sure it qualifies for Leaderfund. The finance committee will then decide whether a reimbursement will be made. If approved, Leaderfund will deposit the funds in your account within 4-6 weeks.

What if we have more questions?

Feel free to contact the Jessica.Horace@utsa.edu if you have any more questions.