



# **OSI Financial Q&A / Drop-In**

SPRING 2025

# What has stayed the same?

## The Budget Request process has not changed!

You will continue to Budget Request during their open submission periods of Wednesday 7am-Friday 7pm.

## As in the Fall 2024, there is the Supplier Registration Form.

Any period or business entity receiving payments (reimbursements, invoice payments) must register themselves as a supplier in Workday.

You cannot submit a supplier registration for someone else.

If you are unsure if a supplier is registered, email [involvement@wesleyan.edu](mailto:involvement@wesleyan.edu).

# What's changed?

*We have a new  
purchasing process!*

Financial Request  
Forms are gone!

All Reimbursements,  
Invoice Payments, and  
Purchases will be done  
through the **Purchase  
Request** on WesNest

# Purchase Requests

## Starting your Purchase Request:

- Found on your group's Finance page of WesNest, under 'Create Request'
  - Same location as the Budget Request!
- Fill out the Subject, Description, and Amount.
- Category: Do your best with selecting, it is not essential that the category correct.
- Select the account that is the source of funding
  - If you have budget requested, select the SBC Allocations account.
  - Indicate if you will be splitting the cost between accounts (i.e. between SBC and Income accounts)

## If you are making a purchase...

- Complete your Purchase Request and attach a list of items (with hyperlinks, quantities, and prices per item) Remember to include shipping, tax, delivery/additional fees.
- You MUST make an appointment with OSI to complete the purchase
  - Schedule on Calendly with Emily Donahue to make the purchase (link in PR)
- A purchase may not be completed if the price exceeds the Budget Requested amount.

# Purchase Requests

## If you are seeking Reimbursement...

Complete the Purchase Request with the receipts uploaded.

Valid receipt criteria:

1. Company Name
2. Date of Purchase
3. Itemized List of Goods
4. Payment Method
5. Payment Amount

If the individual bought items from multiple vendors, you may combine those receipts. Submit 1 Purchase Request per individual that needs reimbursement.

## If you need to pay an invoice...

Complete the Purchase Request with the invoice uploaded.

Valid invoice criteria:

1. Name and address of vendor
2. Remittance address
3. Invoice date
4. Detailed description of purchase or service performed

# Additional Information

## Tips:

- Please wait until after your Budget Request has been approved to submit a Purchase Request for the payments from your request.
- The Financial Manager is the only person permitted to submit a Purchase Request.
- Groups may only have one Financial Manager.

## Credit Card Appointments = Purchasing Appointments

Credit Card appointments are now called Purchasing appointments. After you submit the Purchase Request, the Purchasing Appointment process has stayed the same. If you are making a purchase, you must schedule a meeting with Emily Donahue.

# Receiving Packages

**Office of Student Involvement:  
Usdan 102  
Open Monday - Friday  
9am-5pm**

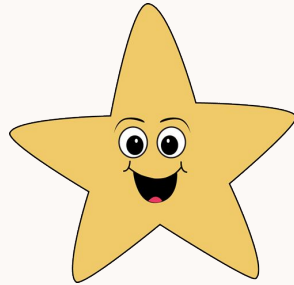
You cannot pick up packages outside of this timeframe.

All packages ordered through OSI will be shipped to the OSI office.

When an order arrives, the Financial Manager will be contacted to retrieve the package from Usdan 102.

You must retrieve the package within 3 business days after you are notified.

If packages are not picked up within this timeframe, it may affect your group's ability to order with OSI.



**Any questions? Email  
involvement@wesleyan.edu**