



Office of Student Involvement

BUDGET REQUEST QUICK GUIDE

**** This Quick Guide is for submitting SBC Funding requests during the Fall and Spring semesters****

**** If your request is related to an event your club is hosting, your event must be approved by OSI before proceeding with any Budget Request****

Familiarize yourself with the SBC Budget Period timeline. Typically, the SBC Budget Request Period begins on Wednesdays at 12:01 am and concludes on Saturdays at 11:59 pm. After the submission period closes, the SBC reviews all requests on the following Monday and Tuesday.

Create a Budget Request on WesNest. The Budget Request Form can be found on your group's Finance page in WesNest, under 'Create Request.'

Filling out your Budget Request Form

Complete the Request Details section:

Title: Enter a brief description of the goods/services for which you are seeking funding.

Description: Explain why your club is requesting the goods or services. This is required by the University and describes the purpose of the request.

Complete the Additional Information section:

Be prepared with information about your club's Income Account (if applicable), pertinent information about the date(s) and events or activities the funding will be used for, the number of participants, and the amount of future SBC funding your club anticipates it will request in the present academic year.

Expense Category: This section prompts you to create line items for your purchase and separate them into categories. For example, if your club is purchasing candy and decorations for an event, you would create two Expense Categories: one titled Candy, one titled Decorations. When you create an Expense Category you will be prompted to add the line items associated with that category.

Complete the New Line Item section:

1. **Line Item Category:** Choose the category that most closely matches your purchase. For example, if your club is purchasing candy, you would choose “Business Meal/Food and Drink.”
2. **Name:** Provide a brief description of the goods/services for which you are seeking funding.
3. **Description:** Explain why your club is requesting the goods or services. This is required by the University and describes the purpose of the request.
4. **Quantity and Cost:** Input the quantity and total cost of the goods/services for that line item.
5. **Upload Support Document:** You will upload the documents required to process your request:
 - a. For Credit Card Purchases through OSI: upload a list of the items (with links and prices per item) in a Word, Excel, or pdf document. Include pertinent details such as quantities, colors, sizes, etc.
 - b. For Student Reimbursement: upload a valid receipt. Refer to CLM p. 30 for details on Valid Receipt Criteria.
 - c. For Vendor Invoice Payment: upload a valid invoice. Refer to CLM p. 31 for details on Valid Invoice Criteria.
6. **Submit:** Click “Submit” to complete your Budget Request submission.

Budget Request Approval: If your Budget Request is **Approved**, you will submit a **Purchase Request** on WesNest. **If this request is for a Credit Card purchase, you must schedule an appointment with Michelle Vargo or Helene Garrick via the scheduling links on the OSI website OR the links in the Purchase Request form.**