USC Mann Associated Student Pharmacists Finance Handbook

USC Alfred E. Mann School of
Pharmacy and Pharmaceutical Sciences
2023-2024

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USC Mann Associated Student Pharmacists Finance Handbook Version 16 07/29/23
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1. **Background**

    This document will describe funding options, procedures, and guidance as it pertains to reimbursements and funding sources for individual students and Recognized Student Organizations of the Associated Student Pharmacists.

2. **School of Pharmacy Student Fund (SOP Fund)**
    A. **Introduction**
        1. The SOP Fund is a gift from the Dean of USC Mann to the student organizations to be used for professional expenses and activities. The amount varies from year to year and is not guaranteed.
        2. Each organization's allotment of funds may vary from year to year and is determined by the USC Mann Associated Students Pharmacists (ASP) Faculty Advisor(s), and ASP Vice President of Finance at the beginning of each academic year.
        3. To use the allotted funds, a student must make a purchase on behalf of an organization in his or her name. The student will then submit a request for reimbursement from the organization's allotment of the SOP funds. Purchases can only be made by a student, in the student's name. Payments made in the name of the organization will not be reimbursed.
        4. The use of these funds is a courtesy from USC Mann; therefore, all rules and regulations must be strictly followed to receive reimbursement.
    B. **Eligibility for SOP Funds**
        1. All organizations under the ASP umbrella are entitled to SOP Funds if they are considered to be in "good standing," as defined by the ASP bylaws.
        2. At the beginning of each academic year, each organization's Director of Finance will submit a RSO's Proposed Yearly Funding Form to the ASP Vice President of Finance and GSG Senators detailing how the

organization plans to use the funds allotted.

3. Each expense or event for which the organization plans to use the funds must be professional in nature and reasonable in terms of price, purpose, and necessity as deemed so by the ASP Faculty Advisor(s), the ASP Vice President of Finance, and/or the USC Mann Division of Financial and Business Services.

4. Each organization must have their account with the USC Credit Union. It may not be a personal account, and it must be transferable year to year to each subsequent Director of Finance.

   i. Each organization must have two authorized signers. One must be the current school year's Director of Finance, and the other must be a fellow organization board member.

   ii. To set up an account, the organization will need to provide the USC Credit Union with an EIN. This is not the USC Tax ID number, which may not be used for this purpose.

5. Each year, each organization must submit two sets of documents in order to remain eligible for SOP funds, and they are the **RSO's Proposed Yearly Funding Form** and the **Project and Events Forms.**

   i. The RSO's Proposed Yearly Funding Form is submitted prior to the start of the school year and must include:

      a. The name of the organization

      b. The name and email address of the Director of Finance or organization liaison

      c. The organization's mission statement

      d. Description of all proposal(s) for the school year including:

         i. Name of reimbursable project

         ii. Purpose

         iii. Description

    iv. Date of project

    v. Estimated cost of project with reasonable justification

  e. Funding request including

    i. Itemized description of expense(s) for each proposal (e.g., supplies, rental fees, etc.)

    ii. Previous cost of each proposal

    iii. Estimated future cost of each proposal

    iv. Total amount requesting from SOP Funds

    v. Total amount requesting from GSG Funds

    vi. Total amount covered by the organization's funds

ii. In addition, by the 1st of the month, 1 month prior to each event hosted by the organization, each organization must submit a completed **Projects and Events Form** online on EngageSC. A copy of the completed Projects and Events Form submission from EngageSC must be included with reimbursement form submissions after each event. Each form must include:

  a. The name of the organization

  b. The name and email address of the Director of Finance or organization liaison

  c. Description of proposal(s) including:

    i. Name of reimbursable project

    ii. Purpose

    iii. Description

    iv. Date of project

    v. Number of expected attendees

    vi. If held previously, how much funding was provided through SOP or through GSG

6. The deadline for submitting the RSO Proposed Yearly Funding Form will be set by the ASP Vice President of Finance for all organizations prior to the start of the academic year.

7. Any organization that fails to submit a RSO Proposed Yearly Funding Form or all their completed Projects and Events form by the designated deadlines will forfeit its eligibility to receive SOP Funds for that academic year.

C. Fund Allocation Structure

1. **Organization Stipend**

   i. Each organization will be allotted a fixed organization stipend each academic year.

   ii. Organizations may use these funds as they deem appropriate without prior approval provided all expenses are deemed "allowable."

   iii. If 50% of funds are not used by the end of the Fall Semester, the organization may be required to present a plan outlining how the funds will be used by the end of the academic year to the ASP Faculty Advisor(s) and/or ASP Vice President of Finance.

      a. **If an organization fails to show its plans to use the funds by the end of the Fall semester, its remaining allotment may be resorbed and reallocated.**

2. **Conference Fund**

   i. All students who are members of ASP organizations may apply for reimbursement toward conference registration and travel expenses in the form of Conference Scholarships.

   ii. Conference Scholarship allotments, among other variables, will be determined by the ASP Vice President of Professional Conferences based on the student's purpose for attending

the conference.

        a. Conference Participants

                i. Students who represent the USC Alfred E. Mann School of Pharmacy and Pharmaceutical Sciences as Poster Presenters, Competitors, and Delegates

                ii. General Attendees

      iii. See "Conference Fund Policy" for additional information.

3. **Health Fair Operations Fund**

      i. The Health Fair Operations Fund is overseen by the Director of the Office of Student Outreach for Community Health.

      ii. Organizations who wish to use Health Fair Operations Funds for their community outreach events should contact the ASP Director of Community Health.

4. **ASP Operations Fund/GSG Organizational Fund**

      i. The ASP Operations Fund is reserved for the ASP Executive Board for use toward professional expenses and events.

D. **Fund Allocation Determination**

1. The dollar amount assigned to each SOP Fund (i.e., the Organization Stipends, Conference Fund, Health Fair Operations Fund, and ASP Operations Fund) will be determined at the beginning of each academic year once all SOP Request Forms have been submitted.

2. Allocations into each fund will be determined by the ASP Faculty Advisor(s), ASP President, ASP Vice President of Finance, and ASP Vice President of Professional Conferences based on a variety of variables including, but not limited to the amount of SOP Funds available, past spending, anticipated future spending, and the number of organizations requesting funds.

3. Once allocations are made, the decision is final, and no appeals will

be entertained.

    4. Organizations found not to be using their funds for whatever reason will have their balance resorbed and reallocated.

E. Allowable Expenses

1. Only professional expenses that are considered reasonable in terms of price, purpose, and necessity may be reimbursed by SOP Funds.

2. All expenses must be written by a written business proposal (i.e., the organization's Proposed Yearly Funding Form).

3. The names of those who benefited from the transaction must be disclosed on all reimbursement forms.

    i. This includes, but is not limited to gift recipients

4. This means that almost all reasonable, legitimate business (i.e., professional) expenses may be reimbursable with the SOP fund unless they are government unallowable, unreasonable, or prohibited by the Business Office.

F. Unallowable Expenses

1. **Government Unallowable**

    i. Government unallowable expenses are those items that, although potentially appropriate and reimbursable from other university sources, are not allocable to government activities per Federal Government regulation.

    ii. The items listed below must be identified and segregated regardless of the account bearing the expense to avoid their being allocated to various government indirect cost categories.

    iii. Government unallowable expenses include all expenses related to:

        a. Alumni Events (including fundraising expenses)

        b. Commencement (including student graduation

parties)

c. Development (including promotional gifts to donors)

d. Public Relations (including banquets and advertisements)

e. Student Activities (including contributions to student organizations and events; fundraising)

    i. At least 50% of these funds must be allocated to:

        1. Open to all USC Mann students

        2. Must contain co-curricular outcome

    ii. Up to 50% of these funds may be allocated to:

        1. Organization-specific social events with a co-curricular component (i.e., banquet with networking, professional development opportunities, etc.)

f. Alcoholic beverages

g. Contributions/donations

h. Fines/penalties

i. First class airfare

j. Flowers/gifts

    i. Note: Gifts for speakers, preceptors, and professional guests are reimbursable through the SOP fund up to $75.00 per recipient, with appropriate documentation.

    ii. Gifts for speakers and preceptors that are employed by USC Mann are not reimbursable.

    iii. If a gift is given, the first and last name of the gift recipient must be disclosed.

2. **Prohibited by the Business Office**

    i. As the SOP Fund is a gift from the Dean of USC Mann, it

may only be used for expenses deemed appropriate by the Business Office.

ii. Items deemed non-reimbursable includes:

    a. Business cards

    b. Gift cards

    c. Taxicab rides

        i. Note: Ridesharing services such as Uber or Lyft are reimbursable if a valid receipt and appropriate documentation are included.

    d. Gas

    e. Rental cars

    f. Food for non-professional events (i.e., organization general or board meetings)

    g. Banquet expenses

    h. Organization board member gifts

    i. Parking

    j. Medical supplies for Health Fairs

    k. Gifts for students who are Speakers for events, unless they are pre-approved by the ASP Faculty Advisor(s)

    l. The above list may not be all-inclusive and is subject to change at any time at the discretion of the Business Office.

G. Reimbursement Forms

1. All reimbursements will be processed upon the submission of paperwork that has been filled out completely and correctly. The most updated versions of all forms must be used and can be found on the ASP website.

    i. Reimbursement requests that are to be considered for the Fiscal Year 2023 - 2024 (July 2023 - June 2024) SOP

Student Funds must be submitted no later than May 15th, 2024, to the ASP Vice President of Finance.

ii. Reimbursement forms submitted after this date and time will be considered for the following fiscal year, 2024 - 2025.

iii. A copy of the completed Projects and Events Form submission from EngageSC must be included with reimbursement form submissions after each event.

iv. Submit a physical copy of all forms to Dr. Franson's office in PSC 700C (7th floor).

2. **Non-Travel Expense Report**

i. The Non-Travel Expense Report (*Appendix D*) is the most commonly used form which can be used for expenses including, but not limited to, events, food purchases, and any other expenses not pertaining to travel costs or facility rental.

ii. Forms are to be submitted to the ASP Vice President of Finance no later than two weeks following the event or purchase or by the deadline determined by the ASP Vice President of Finance.

3. **Travel Expense Report**

i. The Travel Expense Report (*Appendix E*) may be used for travel expenses, including conference expenses, for expenses such as plane or train tickets, personal mileage, lodging, food, and conference registration.

ii. Forms are to be submitted to the ASP Vice President of Professional Conferences no later than two weeks following the event or purchase or by the deadline determined by the ASP Vice President of Professional Conferences.

4. **Internal Requisition (IR) Form**

i. An IR Form (*Appendix F*) may be used for payments to USC-owned facilities (e.g., Seaver, the Radisson Hotel at

University Park Campus, the USC Bookstore etc.)

    ii.   A quote from the vendor must be included with the IR.

    iii.   IRs must be submitted to the Vice President of Finance at least 3-4 weeks prior to the event or purchase.

    iv.   The payment will be made by the Business Office directly to the facility. I.e., no student purchase is required, and the organization does not need to wait for a reimbursement.

5. **Purchase Order (PO) Form**

    i.   A PO Form (*Appendix G*) may be used for payments made to USC-approved vendors that are not owned by USC.

        a.   Note: USC-approved vendors change frequently. Please consult the "Approved Vendors List" on the USC Graduate Student Government website.

    ii.   A quote from the vendor must be included with the PO.

    iii.   POs must be submitted to the Vice President of Finance at least 3-4 weeks prior to the event or purchase.

    iv.   The payment will be made by the Business Office directly to the facility. I.e., no student purchase is required, and the organization does not need to wait for a reimbursement.

H. Reimbursement Process (Non-Travel and Travel Expense Reports)

1. **Overview**

    i.   The RSO officer must complete the Projects and Events form online on EngageSC by the first of the month, the month prior to each event. Only the assigned officer representing the organization may submit the Projects and Events form for review on behalf of the organization.

    ii.   The student requesting reimbursement (the reimbursee) must complete the "Checklist For All Reimbursements" Form on EngageSC and await a decision. A student may only request reimbursement if he or she has made a payment

under his or her own name.

   iii. The "Checklist For All Reimbursements" Form will be reviewed by the ASP Vice President of Finance who will then grant approval or specify revisions that need to be made. If revisions are necessary, the student will be asked to resubmit the form.

   iv. Once the "Checklist for All Reimbursements" Form on EngageSC is approved, the reimbursee must drop off the original receipt of item(s)/purchase(s) with the printed event request form to Dr. Franson's office in PSC 700C. Forms/documentation must be submitted no later than two weeks after the event date.

   v. The forms will be reviewed by the ASP Faculty Advisor for approval, who will then submit the forms to the USC Mann Division of Financial and Business Services, i.e., the "Business Office.

   vi. Once the reimbursements have been processed, the ASP Vice President of Finance will receive funds from the Business Office and issue reimbursement checks or USC Credit Union account transfers (direct deposit) to organizations and/or students.

      a. Note: Reimbursements may take 8 weeks or more to be processed.

2. **General Considerations**

   i. With the exception of internal requisitions (IR) and purchase orders (PO), organizations may only use their SOP Funds by reimbursement. Students are required to use personal funds and will only be reimbursed after the appropriate documentation is submitted.

   ii. Only the student who made the transaction may be

reimbursed for an expense.

    iii.   Joint Events

        a. For events that are hosted by two or more organizations, it is the responsibility of organizations to split the expenses amongst themselves. Reimbursements cannot be split between two organizations' SOP Fund allotments.

3. **Reimbursement Requirements for Non-Travel Expense Report**

    i.   The following documents and information must be provided for all non-travel expenses including supplies, events, and food purchases:

        a. **Non-Travel Expense Report**

            i. The student body organization name, the business purpose including name of event and date of event, and name and contact information of the individual making the purchase must be indicated.

            ii. The report should provide a line-item description of items that were purchased by a student, the quantity bought, the cost, and any other additional taxes and fees.

                1. Note: Descriptions of items or services purchased must be specific. Receipts that only list the purchase total or include vague descriptions, such as "miscellaneous," "supplies," or "food" are not acceptable. The receipt must clearly list each item or service purchased. Form of payment must be in the name

of the individual who made the purchase.

  iii. The total reimbursement amount should be indicated and should be equal or less than the total expense.

  iv. The form must be signed and dated by the individual who made the purchase.

 b. **Receipt(s)**

  i. Receipts must be original forms taped to a plain 8.5" x 11" sheet of paper.

  ii. Receipts that are too long to fit on one sheet of paper must be cut and attached in separate pieces. (<u>Use single side only</u>).

  iii. Receipts must include each of the following:

   1. Name of merchant

   2. Amount of charge

   3. Itemized list of purchases

   4. Payment method (Cash/Card)

   5. Transaction date

   6. Tax/delivery charges (if applicable)

  iv. Receipts cannot include personal purchases. Only items requested to be reimbursed should be on the receipt. <u>Should receipts containing non-reimbursable items be listed on the same receipt, the request will be nullified.</u>

 c. **Credit Card Purchases**

  i. The credit card must belong to the student being reimbursed (not his or her parent, spouse, organization, etc.)

  ii. Should the student use a **Debit card** or a

Credit card, the last four digits of the card must show on the receipt.

   d. **Personal Check Purchases**

      i. The check must be written from the student's personal bank account (not the organization's bank account.)

      ii. An image of the cleared check must be included.

      iii. For **gift purchases**, the name(s) of all recipients must be listed under "Description."

      iv. For **food purchases,** the number of attendees must be indicated under "Qty."

      v. All forms must be **paper clipped together, not stapled.**

      vi. Purchases made through **Cashier's checks** will **NOT** be reimbursed

      vii. Purchases through PayPal **MUST** be done through a PayPal account that is connected to a bank account, **NOT** a guest account.

      viii. If PayPal is used, then a statement/receipt from the PayPal account showing both the expenditure and the bank account number must be submitted in addition to a bank statement showing both the expenditure and the bank account number.

4. **Reimbursement Requirements for Travel Expense Report**

    i. The following documents and information must be provided for all travel expenses including conference registration, lodging, and airfare.

      a. **Travel Expense Report**

     i. The student body organization name, the conference or meeting name, the conference or meeting location, and name and contact information of the student attending the conference must be indicated.

     ii. The total reimbursement amount should be indicated and should be equal or less than the total expense.

        1. If the student was granted a Conference Scholarship, the total reimbursement amount should not exceed the scholarship amount granted to that individual as determined by the ASP Vice President of Professional Conferences and/or the ASP Faculty Advisor(s).

     iii. The form must be signed and dated by the individual who made the purchase.

b. **Original conference name badge**

     i. Conference attendees must include their original conference name badge, mounted to a plain 8.5" x 11" sheet of paper with clear tape if submitting physical documents.

c. **Conference registration confirmation** which includes payment method, the last four digits of the card used to pay if a card was used, and the amount paid.

d. **Receipt(s)**

     i. Receipts must be taped to a plain 8.5" x 11" sheet of paper.

      ii. Receipts that are too long to fit on one sheet of paper must be cut and attached in separate pieces. (Use single side only)

      iii. Receipts must include each of the following:

         1. Name of merchant

         2. Amount of charge

         3. Itemized list of purchases

            a. Note: Descriptions of items or services purchased must be specific. Receipts that only list the purchase total or include vague descriptions, such as "miscellaneous," "supplies," or "food" are not acceptable. The receipt must clearly list each item or service purchased. Form of payment must be in the name of the individual who made the purchase.

         4. Transaction date

         5. Tax/delivery charges (if applicable)

      iv. Receipts cannot include personal purchases. Only items requested to be reimbursed should be on the receipt. Should receipts containing non-reimbursable items be listed on the same receipt, the request will be nullified.

e. **Credit Card Purchases**

      i. The credit card must belong to the student being reimbursed (not his or her parent, spouse, organization, etc.).

ii. Should the student use a Debit card or a Credit card, the last four digits of the card must show on the receipt.

f. **Check Purchases**

i. The check must be written from the student's personal bank account (not the organization's bank account.)

ii. An image of the cleared check must be included.

g. **Checklist of minimum required conference events**

i. If the student has received a conference scholarship through an ASP organization, he or she may be required to submit a signed list of minimum required events as proof of attendance.

ii. All forms must be **paper clipped together, not stapled.**

iii. Submit a physical copy of all forms to Dr. Franson's office in PSC 700C (7th floor).

3. **Graduate Student Government (GSG) Funding**

   A. **General GSG Funding Considerations**

   *Please review the comprehensive, in depth <u>2023-2024 GSG Finance Policies</u> for detailed expectations and procedures.

   1. Graduate student organizations must be recognized through USC Campus Activities in order to be eligible for GSG funding.

   2. In order to be eligible for funding, at least one member must complete the online <u>GSG Finance Orientation</u>.

   3. Organizations are expected to utilize GSG funding, when possible, prior to using SOP Funds.

4. Each student organization is allowed to spend up to a total of $10,000 per semester ($2,500 from the discretionary fund, joint programming fund, volunteer fund, and social justice fund).

B. **Category of GSG Funds**

1. The following funds must be requested from the GSG website directly:

   i. **Organization (Umbrella) Fund**
      a. Calculated as $17 per student per year, based on reported enrollment numbers from the previous Academic Year.
      b. Only fee-paying graduate students count toward enrollment numbers.
      c. Only for the programs represented by an Umbrella Organization.
      d. Fund can be used for "closed" events exclusive to the Umbrella Organization's student population.

   ii. **Discretionary Fund ($2,500)**
      a. Fund open to all organizations designated for student events.
      b. Available on a first come, first served basis.
      c. Events must be advertised through GSG as open to all USC graduate students and include the GSG logo on promotional material.

   iii. **Joint Programming Fund ($2,500)**
      a. Fund open to all events organized by two or more organizations from two or more distinct schools/departments.
      b. Available on a first come, first served basis.
      c. Events must be advertised through GSG as open to all interested USC graduate students and include the

GSG logo on promotional material.

    iv. **Volunteer Fund ($2,500)**

        a. Open to all student organizations for volunteer or community service events.

        b. Available on a first come, first served basis.

        c. Events must be advertised through GSG as open to all interested USC graduate students and include the GSG logo on promotional material.

        d. Note: Health fair medical supplies will NOT be covered by GSG funds.

    v. **Social Justice Fund ($2,500)**

        a. Open to all organizations for social justice related events.

        b. Available on a first come, first served basis.

        c. This fund is meant for advocacy on behalf of underrepresented/marginalized groups.

        d. Events must be advertised through GSG as open to all interested USC graduate students and include the GSG logo on promotional material.

    vi. **Sustainability Fund ($2,500)**

        a. Primarily used for a Green Fund at USC in conjunction with Undergraduate Student Government and University Administration.

        b. Apply directly to the Sustainability Office for this fund.

    vii. **Professional Development Fund**

        a. The fund ($500) is provided for students to travel to conferences to present research or attend. The fund is available Fall and Spring. Additional information and limitations are available on the GSG website.

        b. Important Note: This fund is not included in the

student organization $2,500 cap per semester restriction. Any student can and should attempt to request conference attendance funds through this mechanism. Students should utilize this resource prior to requesting funds from the SOP Fund and must demonstrate an attempt to request GSG funding prior to requesting SOP funding.

    c. Application procedure and guidelines could be found on the GSG website (https://gsg.knack.com/tg#home/)

C. GSG Organization (Umbrella) Fund

1. Effective Fall 2016, ASP is responsible for allotting GSG Umbrella Funding to student organizations which fall under the ASP umbrella.

2. The Organization Fund is calculated as $17 per student per semester in each school department. The organization fund is mainly limited to events that benefit only the department student body. If the funds are unused, and the organization has no intent to use these funds, the ASP Vice President of Finance will transfer the remaining funds during Spring Break into the Discretionary Fund.

3. The GSG Organization Fund is restricted from events that benefit USC Mann students only, i.e., events that are not interdisciplinary or community services events. Any organization hosting events that are only open to the USC Mann would need to request Organization Funds directly from the ASP Vice President of Finance.

4. For events that are open to the public (e.g., interdisciplinary events or community service events, etc.) organizations will still be responsible for requesting funding directly from the GSG

website.

5. Organization Funds, despite being in the control of ASP, are still subject to the $2,500 per organization per semester GSG Funding cap.

D. Application Deadlines

1. Budget and Expense Proposals – GSG follows its own calendar regarding when these must be submitted. The calendar specifying these dates can be found on the GSG website. This is generally at least one month (3 weeks, 5 weeks, or 8 weeks) in advance of the event.

    i. 3-week events: small events with only food or small purchases (ex: gift card prizes, small non-customized prizes, amazon supplies).

    ii. 5-week events: anything with Trojan Event Services, anything 100 people or less, all events between $1,000 - $2,500.

    iii. 8-week events: events with >100 people, any event using Bright or Town and Country rentals, outdoor events, events with large catering orders, events >$2,500; must meet with gsgupcfi@usc.edu prior to submission.

2. Post-Event Form – This should be submitted within 5 days after the event.

E. Important Terms

1. Blue Probationary List

    i. If all receipts, invoices, prize recipient information are not provided within 5 business days after an event takes place, the organization is placed on this list, barring any immediate funding.

2. Black Probationary List

    i. If the aforementioned documents are not provided within 10

business days after an event takes place, the organization moves to the Black Probationary List, prohibiting all funding to that organization for the semester following the offense.

3. Yellow Probationary List

   i. Failure to abide by student and behavioral conduct rules and policies presented in the GSG Finance Policies Handbook or general USC Policies.

4. Fiscal Year

   i. A defined 12-month period for budgeting, accounting, and tax purposes. USC's Fiscal Year runs from July 1 to June 30. Previous Fiscal year balances are not transferable to the new Fiscal Year balances.

F. **Resources for applying for funds through GSG:**

1. General GSG Finance Policies
   https://docs.google.com/document/d/1GnxBIFmNJC9iVqcrR47jXz SyABLsTMAVquy50f_PTTk/edit?usp=sharing

2. GSG Webpage: https://gsg.usc.edu/gsg-funding/

3. Yearly Budget Proposal Form

   i. An Annual Budget Proposal is a form proposing all potential events for approval by GSG with all event expenses included.

   ii. One must be submitted per RSO per year.

4. Event Request Sheet

   i. **Upload to EngageSC at least one month prior to an event by the first day of each month.**

   ii. The Event Proposal Form must be sent immediately after receiving a confirmation email approving funding for your event.

5. GSG Application Form via Pluto :

   i. One form per event must be submitted 4 weeks prior to each

<u>event submitted by one officer and one post event form must
be submitted within 5 days.</u>

4. **Conference Funding**

    A. **Introduction**

    1. There will be a portion of the SOP Fund set aside with the
    intended purpose of supporting students in their endeavors to
    attend professional conferences. Each conference is given a
    budget, as determined by the ASP Vice President of Professional
    Conferences, which is used to reimburse student attendees.

    B. **Attendance and General Guidelines**

    1. Please refer to the "Student Conference Attendance Policy" form
    which can be found here on the ASP website
    (http://www.uscassp.org/important_documents/.) The form is
    located under the heading "Policies, Forms, and Important
    Documents."

    2. In addition, to be eligible for reimbursement, all relevant and
    appropriate paperwork must be completed and submitted in a
    timely manner.

    C. **ASP Reimbursement Policy for Conference Attendance**

    1. Anyone with a role in a conference beyond general attendees
    (e.g., Poster Presenters, Delegates, Competitors) may receive up
    to full reimbursement for all allowable costs incurred at a
    conference, up to a maximum of $1,200 per student per year
    provided that all necessary paperwork and documentation is
    provided. This amount is negotiable based on location(s) of
    conferences within the year. After this maximum is reached, the
    student will be reimbursed as a general attendee.

        i. Food and mileage will not be reimbursed.

    2. General Attendees have a lower priority for reimbursement, and

the amount is dependent on how much of the budget allotted to the conference remains after the individuals who have a role in a conference have been accounted for and on how many conferences they have attended previously.

    i.   **For 1ˢᵗ and 2nd time attendees,** their maximum reimbursement will be 20% less than other general attendees.

    ii.   **For 3rd time attendees and beyond**, their maximum reimbursement will be 30% less than other general attendees.

    iii.   Finally, the amount deducted from attendees who have gone to more than 1 conference will be pooled and split amongst the 1ˢᵗ time attendees, adding to the amount they will be receiving as scholarships.

    iv.   When counting conference attendance, this is not how many times a student has attended a specific conference. This is a running total of how many conferences a student has gone to while attending USC Mann.

    v.   Please note that the deductions for attendance will still apply, even if a student has not requested reimbursement for previous conference attendance.

Appendix A. Sample Project and Events Description Form

📋 ASP Projects and Events Approval Form DRAFT

Please fill in the information below completely and then press the submit button. This action will electronically send the document to Kari Franson, Senior Associate Dean for Academic and Student Affairs and Professor of Clinical Pharmacy, and Stella Yeghnanyan, Academic Program Administrator. Additional information or documentation may be required to secure department approval. Please note that this form **is a request for approval and does not constitute approval for a project/event**. This form does not replace any reservation form(s) required by any venue(s) in question. This form is not a request for space.

Organization Name: *   — Select Group —

Student in Charge: *   Start typing and wait for suggestions...

Student Organization Advisor Name and Email: *

Student's E-mail Address: *

Mobile Number: *

Official Event/ Project Name / Title: *

Please select the month the event will occur. *
- ○ August, 2023
- ○ September, 2023
- ○ October, 2023
- ○ November, 2023
- ○ December, 2023
- ○ January, 2024
- ○ February, 2024
- ○ March, 2024
- ○ April, 2024
- ○ May, 2024

Proposed Date of Event: *

Start and End Time of Event: *

Event Location *
- ○ In-person- at USC
- ○ Zoom
- ○ Hybrid
- ○ In-person - not at USC

Describe in no more than three sentences the objectives of the event: *
(Minimum words: 10)
(Maximum words: 300)

[If an attendee were to be asked about the event, these objectives would be described]

Will this event meet co-curricular requirements? *
- ○ Yes
- ○ No
- ○ I am not sure, would like co-curricular office to review

USC Mann Associated Student Pharmacists Finance Handbook Version 16 07/29/23
Kristina Schmidt, Eun Bi Na, Lyndsie Okumura, Michael Lee, Seda Byurat, Ndinda Domingos, Tim Dang, Ervin Poorghasamians, Ryan Leung, Emily Hou, Veronica Soliman, Sharon Na, Carrie Ear, Marissa Angelich, Nathalie Iribe, Gagan Bhullar, Dr. Susie Park, Dr. Kari Franson. 27

Who is the intended audience? (please select all that apply) * **(Maximum authorized answers: 7)**

- [ ] P1 Year Students
- [ ] P2 Year Students
- [ ] P3 Year Students
- [ ] P4 Year Students
- [ ] Outside Pharmacy School audience
- [ ] Undergraduates
- [ ] Other

Minimum registration to avoid cancelling: *

Maximum registration allowed: *

Will alumni be involved? *
- ( ) Yes
- ( ) No

Will there be fundraising? *
- ( ) Yes
- ( ) No

Speakers? Invited Special Guests? List each guest first and last name, and e-mail address: *
[Please provide each non-USC faculty with the option of Biggy parking reservations, a hand-written thank you note, and a thank you gift valued at a minimum of $25.00 each; more if they represent a larger corporation. Contact Noemi Ortega if it is an alumnus of USCSOP]

What is the agenda for the event? *
⬆ Upload file

Please download and complete the attached agenda for your event.

Document: ASP_Event_Agenda_2

Will food be served before, during, or after the event? *
- ( ) Yes
- ( ) No

Are you requesting funding for this event/project? *
- ( ) Yes
- ( ) No

For an event for which you are requesting reimbursement, you must:

1. Complete and submit the CHECKLIST FOR ALL REIMBURSEMENTS form and await a decision after your event has been approved.
2. Drop off the ORIGINAL receipt of item(s)/purchase(s) with the printed event request form to Kari Franson's office *no later than* **two weeks** *after the event date.*

The proposed cost of the venue (if applicable): *

The Proposed cost of food (if applicable): *

The proposed cost of guest gifts (if applicable; see guest list above): *

The proposed cost of guest parking (if applicable): *

The proposed cost of other essential supplies to carry out this event (if applicable): *

TOTAL PROPOSED COST of EVENT: *

Are SOP Student Funds requested? If so, how much? *

Are SOP Student Funds requested? If so, how much? Are GSG Funds requested? http://gsg.usc.edu/student-funding/ If so, how much? *

If you previously organized this event, how much did you receive from: SOP Student Funds? From GSG? *

Will you submit an online application for Graduate Student Government funding? If so, how much will request? *

Please read below and provide your acknowledgment.

Student Acknowledgment: I have researched this event and discussed its description with other organizations. The proposed event aligns with my organization ├óÔé¼Ôäós mission statement. The proposed event and venue follow the event accessibility guidelines established by the USC Office of Institutional and ADA Accessibility. The proposed event does not include materials already covered in the curriculum. There are no other events similar to the one being proposed in this document. I understand this project may not be approved if the criteria are not met. Incomplete applications may not be approved.

USC Office of Institutional and ADA Accessibility: https://accessibility.usc.edu/accessibility-at-usc/event-accessibility/ *

Student Acknowledgment: I have researched this event and discussed its description with other organizations. The proposed event aligns with my organization ├óÔé¼Ôäós mission statement. The proposed event and venue follow the event accessibility guidelines established by the USC Office of Institutional and ADA Accessibility. The proposed event does not include materials already covered in the curriculum. There are no other events similar to the one being proposed in this document. I understand this project may not be approved if the criteria are not met. Incomplete applications may not be approved.

USC Office of Institutional and ADA Accessibility: https://accessibility.usc.edu/accessibility-at-usc/event-accessibility/

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Appendix B. RSO's Proposed Yearly Funding Form

2023-2024 USC Mann ASP-RSO's Proposed Yearly Funding Form

Event Date	Organization	Name of the Event Proposal	Description of Expenses	Previous Budget (2022-2023)	Estimated Budget (2023-2024)	GSG Funding Request Amount	SOP Student Funding Request Amount
					Total	$ -	$ -

Appendix C. SOP Fund Reimbursement Checklists

CHECKLIST FOR ALL REIMBURSEMENTS

All forms have been completed and signed by the individual who made the purchase to be reimbursed, i.e., the reimbursee.

All forms will be submitted by the designated deadline (<u>2 weeks</u> after the event or as designated by the ASP Vice President of Finance.)

The expense or event is considered to be **professional** in nature and **reasonable** in terms of price, purpose, and necessity.

None of the reimbursement expenses listed fall are **"Government Unallowable Expenses."**

- Alumni Events (including fundraising expenses)
- Commencement (including student graduation parties)
- Development (including promotional gifts to donors)
- Public Relations (including banquets and advertisements)
- Student Activities (including contributions to student organizations and events; fundraising)
- Alcoholic beverages
- Contributions/donations
- Fines/penalties
- First class airfare
- Flowers/gifts
    - Note: Gifts for speakers, preceptors, and professional guests are reimbursable through the Dean Subsidy up to $75.00 per recipient, with appropriate documentation.

The reimbursement expenses listed are **prohibited by the Business Office**, including:
- Business cards
- Gift cards
- Taxicab rides (including ridesharing services such as Uber or Lyft)
- Gas
- Rental cars
- Food for non-professional events (i.e., organization general or board meetings)
- Banquet expenses
- Organization board member gifts
- Parking

Appendix D. Non-Travel Expense Report

USCMann
Alfred E. Mann School of Pharmacy
and Pharmaceutical Sciences

Division of Financial and Business Services
NON-TRAVEL EXPENSE REPORT
USC Mann Associated Student Pharmacists

- List each receipt separately.
- Provide the name of the company/business along with the item description and/or purpose.
- If food was provided at this event, please list the number of attendees under "Qty."
- If guest speaker gifts were purchased, list the complete names of the recipients under "Description."
- List names of gift recipients (if applicable).
- Mount all receipts on 8.5" x 11" sheets of paper using clear adhesive tape.
- Use a paperclip to attach all sheets of paper together; do not staple sheets together.
- It is advised to make a copy of this for your records before submission to the ASP Vice President of Finance.

Incomplete and late forms are subject to delays, reduced reimbursement, and/or nonpayment.

Date of Purchase	Description	Qty.	Amount
			$
			$
			$
			$
			$
		Total Reimbursement:	$

Events Serving Food
- Please list the number of attendees if food was served at the event. -or-
- If 10 or fewer individuals attended the event, please list the names of each attendee.

Number of Attendees:	
Complete the First and Last Name of Each Attendee if ≤ 10 attendees *(no abbreviations)*:	1. 2. 3. 4. 5. 6. 7.

	8. 9. 10.

Gift Recipients *(Complete first and last names of all individuals are required):*
- Please list the names of all gift recipients. A name must be listed for each gift purchased.
- Alcohol will not be reimbursed.

First name, Last name	Gift purchased (general description)	Speaker/ Preceptor/ Faculty

Appendix E. Travel Expense Report

USC Mann
Alfred E. Mann School of Pharmacy
and Pharmaceutical Sciences

Division of Financial and Business Services
TRAVEL EXPENSE REPORT
USC Mann Associated Student Pharmacists

- List each original receipt separately.
- Mount all receipts on 8.5" x 11" sheets of paper using clear adhesive tape.
- Tape the original conference name badge on a piece of paper.
- Provide the name of the company/business along with the item description and/or purpose.
- Provide a copy of your credit card statement; names on the company account must match the attendee's name.
- Use a paperclip to attach all sheets of paper together; do not staple sheets together.
- It is advised to make a copy of this for your records before submission to the ASP Vice President of Professional Conferences.

Incomplete and late forms are subject to delays, reduced reimbursement, and/or nonpayment.

Date of Purchase	Description/Item			Allowable** Amount
	Meeting/Conference Registration; Organization			
	Transportation* method: personal vehicle / plane / train			
	Transportation* company:			
	Personal vehicle* mileage (0.54/mile): _____ miles *Attach a copy of Google Maps mileage confirmation from home address to Meeting/Conference venue*			
	Lodging* / Hotel Company: Number of Nights: Rate per Night:			
	Food* (Maximum is $45.00/day; *no alcohol allowed*)			
	Breakfast	*Lunch*	*Dinner*	
		Total Reimbursement:		

Appendix F. Internal Requisition (IR)

USCMann
Alfred E. Mann School of Pharmacy
and Pharmaceutical Sciences

Division of Financial and Business Services
INTERNAL REQUISITION FORM
USC Mann Associated Student Pharmacists

To: Name of ASP VP of Finance

From: Name of IR Requestor

Date:

Subject: Name of Event and Organization Responsible

Description of Event/Service:
    Name of Event:
    Purpose:
    Date of Event:
    Time:
    Number of People Attending:
    Dollar Amount Requested:

Internal Requisition to: Name of USC Approved Vendor

Contact Information for Event/Service:
    Name:
    Title:
    Phone:
    Email:

_____   _____
Requestor's Signature   Date

_____   _____
ASP VP of Finance Signature   Date

_____   _____
Kari L. Franson, PharmD, PhD, BCPP   Date
Senior Associate Dean for Academic & Student Affairs

Received by ASP Faculty Advisor on _____ (date)
Part of Invoice # _____

IR Form Version 3, 8/13/2024
K.L. Franson, S. Park, K. Schmidt, E. Na, S. Byurat, E. Poorghasamians, R. Leung, M. Angelich

Appendix G. Purchase Order (PO)

USCMann
Alfred E. Mann School of Pharmacy
and Pharmaceutical Sciences

Division of Financial and Business Services
PURCHASE ORDER FORM
USC Mann Associated Student Pharmacists
School of Pharmacy Student Funds Account

To: Name of ASP VP of Finance

From: Name of IR Requestor

Date:

Subject: Name of Event and Organization Responsible

Description of Event/Service:
    Name of Event:
    Purpose:
    Date of Event:
    Time:
    Number of People Attending:
    Dollar Amount Requested:

Internal Requisition to: Name of USC Approved Vendor

Contact Information for Event/Service:
    Name:
    Title:
    Phone:
    Email:

_____   _____
Requestor's Signature   Date

_____   _____
ASP VP of Finance Signature   Date

_____   _____
Kari L. Franson, PharmD, PhD, BCPP   Date
Senior Associate Dean for Academic & Student Affairs

Received by ASP Faculty Advisor on _____ (date)
Part of Invoice # _____

PO Form Version 3, 8/13/2024
K.L. Franson, S. Park, K. Schmidt, E. Na, S. Byurat, E. Poorghasamians, R. Leung, M. Angelich