



## UNIVERSITY CLUB FINANCIAL TRANSACTION REQUEST FORM

*(This form is required for all Transactions other than Deposits)*

<b>STUDENT CLUB/ORGANIZATION INFORMATION:</b>	
Club/Organization Name: _____	Date: _____
Requestor's Name: _____	CSUSB ID: _____
Phone Number: _____	CSUSB Email: _____
Event Name / Date: _____	Expense Date: _____
Total Amount Requested: \$ _____	

TRANSACTION TYPE	DESCRIPTION	AMOUNT
<b>CHECK REIMBURSEMENT</b> (\$1000 Max)	(Upload itemized receipt)	
<b>CREDIT CARD</b> <small>(OSLE OFFICE-ONLINE ORDERING ONLY)</small>	(Upload itemized quote and link to website)	
<b>CHECK REQUEST / PURCHASE ORDER</b> <small>(GUEST SPEAKERS, DJs, CATERING, RENTALS)</small>	(Upload itemized quote or invoice)	
<b>CHARGEBACK</b> <small>(ON CAMPUS SERVICES: PRINTING, SPECIAL EVENTS)</small>	(Upload itemized quote or invoice)	

**Chartfield String:**

Account <b>660901</b>	Fund <b>ST ___</b>	Dept ID <b>B0535</b>	Program <b>NONE</b>	Class <b>NONE</b>	Proj./Grant <b>NONE</b>
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<b>Club Officer 1</b> <small>(on Trust Fund Fact Sheet)</small>	Print Name: _____ Position: _____
	Signature: _____ Date: _____
<b>Club Officer 2</b> <small>(on Trust Fund Fact Sheet)</small>	Print Name: _____ Position: _____
	Signature: _____ Date: _____

<b>Club Advisor:</b> (only required if request is over \$500)	Signature: _____ Date: _____
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### ADMIN USE

<b>OSLE Designee:</b> (only required if request is over \$100)	Signature: _____ Date: _____
<b>Finance and Administrative Coordinator:</b>	Signature: _____ Date: _____

\*\* Upload form to [Coyote Connection](#) for processing\*\*

# University Club Financial Transaction Request Form Instructions

*Do not pay for any services to a vendor directly. If a service is paid for directly to a vendor, we will be unable to reimburse you.*

*Examples of services include: guest speaker, venue rental, catering, DJ, etc*

## Transaction Form Steps

1. **Club Name** – club name on Trust Fund Fact Sheet
2. **Date** – today's date
3. **Requestor Name** – person requesting the money
4. **CSUSB ID** – school ID (000000000)
5. **Phone Number** – requestor's phone number
6. **CSUSB Email** – school email ([000000000@coyote.csusb.edu](mailto:000000000@coyote.csusb.edu))
7. **Event Name/Date** – name of event and when it occurs
8. **Expense Date** – when you paid the amount
9. **Total Amount Requested** – amount requested for reimbursement

## Types of Transactions (Fill appropriate box with description and amount on form)

1. **Check Reimbursement:** *For supplies only no services-* \$1000 maximum. Attach original itemized receipts. Receipts are due within 30 days of expense. Attach all pertinent information for individual being reimbursed (name, SID, address, items ordered, amount etc.)
2. **Credit Card:** Upload original invoice/order from vendor and link to website. May need to schedule a meeting with OSLE to process transaction.
3. **Purchase Order:** Services such as guest speakers, DJs, off-campus venue, and orders where a credit card cannot be used. May need to schedule a meeting to process transaction.  
**\*\*Purchase orders require a minimum of 4 weeks to process\*\* / Check Request:** On campus catering and SMSU Invoices
4. **Chargeback:** Printing Services, Special Events room rental fees, Parking Services- Contact Dana Franklin | [dfranklin@csusb.edu](mailto:dfranklin@csusb.edu) (909) 537-3979 for account codes

**Chartfield String:** Provide ST Number

**Signatures** (always required)

1. Club Officer 1 on Trust Fund Fact Sheet – print name, position, enter scanned or electronic signature, date
2. Club Officer 2 on Trust Fund Fact Sheet – print name, position, enter scanned or electronic signature, date
3. Club Advisor – signature, date (if over \$500)

## For OSE and FAC Signatures and Processing Upload Completed Form to Coyote Connection

1. Visit [www.csusb.edu/coyote-connection](http://www.csusb.edu/coyote-connection) and sign in with your Coyote ID / password
2. Choose Forms tab at top of home page
3. Search for University Club Financial Transaction Request Form
4. Select Start
5. Enter your contact information and upload completed University Club Financial Transaction Request Form
6. Upload all required supporting documentation

***Please note: Do not pay for any services to a vendor directly. If a service is paid for directly to a vendor, we will be unable to reimburse you. Examples of services include: guest speaker, venue rental, catering, DJ, etc..***

*For questions or assistance on the transaction process please contact  
Dana Franklin | [dfranklin@csusb.edu](mailto:dfranklin@csusb.edu) 909-537-3979*