

Funds and Reimbursement Guidelines (2016-2017)

How does your club get money to hold an event?

How can you be reimbursed for traveling to a professional conference?

What funds carry over to the next year?

There are 3 different ways you can obtain funds.

1. **SGA**

- a. Money from SGA is requested at the beginning of each academic semester
- b. Budget is estimated based on previous year spending/budget
 - i. Clinics and Projects
 1. Request a certain budget from the TPA VP of Finance
 2. VP of Finance will then submit one budget proposal for all groups on the behalf of COP
 - ii. Clubs and Organizations (APhA, CSHP, SNPhA, etc)
 1. Request budget directly to SGA
- c. Prior to organizing an event, make sure you have sufficient funds available and request for funds after event is approved
- d. Save any receipt for money you spend from your own account and fill out appropriate forms to give to your club finance officer to give to SGA for proper reimbursement
 - i. *The sooner you do this the better*
 - ii. Receipts older than 3 months will not be accepted
 - iii. Receipts for events/funding that is not approved will not be reimbursed
 - iv. Do not assume you will be reimbursed! Always ask before!
- e. If not used by the end of the year, this money will carry over to the next year

2. **COP**

- a. COP account has finite amount of money that is allocated to student activities (special competition travel, Rho Chi, PLS)
- b. TPA and COP board decide how this money is allocated
- c. A certain amount is usually saved for professional development groups (CAPSLEAD, Rho Chi, etc)
- d. The remaining balance is distributed amongst other organizations and class boards
- e. Requests are made through COP VP of Finance
- f. This money is NOT carried over from year to year
- g. **COP Reimbursement Guidelines**
 - i. Clinical/Professional Competition
 1. COP will reimburse state and national clinical/professional competitions sponsored by the following established professional pharmacy associations: SNPhA, AMCP, ACCP, APhA, CPhA, CSHP, and ASHP. COP may reimburse for competitions that are not part of these pharmacy associations.

2. Steps to request reimbursement:
 - a. If a student wants to participate in a competition sponsored by one of the approved associations and the association has a Touro California chapter then the student MUST ask the local chapter for help in funding his/her competition before he/she can submit a reimbursement form to the COP VP of Finance. The **COP will match** the amount provided by the local chapter up to the maximum that has been budgeted for that meeting.
 - b. Complete the **“COP Fund Request Form”** with supporting documents and submit it to Charity Yamada for the Dean’s approval **2 months prior** to the competition date. Contact the COP VP of Finance to get the forms.
 - i. Make sure this is FULLY complete with ALL signatures
 - ii. These forms need to be signed by the advisor of the student organization prior to turning it in.
 - iii. Reimbursement is not guaranteed if paperwork hasn’t been submitted and signed by the Dean prior to travel.
 - iv. Reimbursement is not guaranteed for purchases made prior to Dean’s approval
 - v. After receiving approval to move forward, do not combine purchases with others attending same event. For example, 2 or more students purchasing an airline ticket on 1 credit card or sharing a hotel room and putting purchases on 1 credit card. Students should have own receipts and personal credit card information on each purchase or there will be a delay in reimbursement.
 - vi. If the student will be traveling regardless of being sponsored or not, he/she can make purchases prior to approval but please make sure he/she is fully aware that a reimbursement is NOT guaranteed.
 - c. Once approved, the student will be notified by email and must submit a **“Travel Requisition Form”** with all backup documents for the Dean’s approval.
 - d. Upon return, complete and submit an **“Expense Reimbursement Form”** with receipts for ALL expenses being claimed within 30 days of return.
 - e. The COP VP of Finance will provide in a timely manner a reimbursement figure to the student, and assist with coordinating with the COP Administrator of Business Operations (Mrs. Charity Yamada) completion of required

university forms to request (which must be completed and approved prior to travel) and obtain a reimbursement (which must be completed within two weeks of returning from travel).

- f. The required university forms and instructions can be obtained from Mrs. Charity Yamada, COP Administrator of Business Operations (H-84, foyer area).
3. Reimbursement amounts:
 - a. If a competition resides within California, COP will reimburse up to **\$145** to cover lodging, transportation, registration and food costs in Northern California and up to **\$315** for Southern California. The student must keep costs to a minimum and cannot cover expenses for other people.
 - b. If a competition resides outside of California, COP will reimburse up to **\$315** to cover lodging, transportation, registration, as well as some food costs. The student must keep costs to a minimum and cannot cover expenses for other people.
 4. **NOTE:**
 - a. Reimbursement will NOT be granted if the necessary paperwork hasn't been submitted AND signed by the Dean PRIOR to traveling (TUC COP Research Presentation/Competition Fund Request Form and Travel Requisition Form with backup documents).
 - b. The reimbursement **amounts stated in bullet 3 are not fixed** and they can change upon many factors such as availability of funds, etc
 - c. Students attending clinical/professional competitions not sponsored by the associations mentioned in bullet 1 can still apply for aid request, but aid is not guaranteed.
 - d. A student should not expect that 100% of his/her travel expenses will be covered by the school.
 - e. Clinical/professional reimbursement **WILL NOT** cover membership fees. For example, if a student is to attend a clinical competition sponsored by CSHP and he/she is not a member then he/she is solely responsible to pay for CSHP membership.
 - f. Touro does not reimburse "Quiz bowl" events due to the large number of Touro participants and limited resources.
 - g. **These guidelines are subject to change.** For the latest guideline contact the COP VP of Finance.
 - h. **Final decision for reimbursement will ultimately be determined by the COP VP of Finance and the Dean of the School of Pharmacy.**

- i. **If at any time there is uncertainty about the process, ASK Charity Yamada.**
 - ii. Professional Development
 1. In addition to helping students pay for their travel expense to attend clinical/professional competitions, COP earmarks funds each year to support student professional development and recognize achievement.
 2. COP will reimburse or subsidize up to the following budgeted amounts for the activities listed.
 3. Students may request support for professional development activities not list above, but aid is not guaranteed. COP will provide aid based on availability of funds and programmatic priorities.
 4. Steps to obtain funds:
 - a. The procedures for obtaining travel reimbursements for CAPSLEAD are the same as described above for professional competitions.
 - b. The food orders for the initiation events listed above should be coordinated with the Executive Assistant to the Dean/Curriculum Support Manager (Mrs. Alisa Danyeur). Food orders must be placed a minimum of **two weeks** prior to the event
 - iii. Touro Mandated Professional Meetings
 1. Touro University California mandates COP students to attend one state or national professional meeting prior to graduation.
 2. The average cost of meeting this requirement has been factored into the financial aid packages of COP students so that it does not cause an undue financial burden.
 3. In addition, COP students may be reimbursed up to \$50 for attending a Touro-mandated professional meeting. Reimbursement amounts are subject to change.
 4. COP students must use the SGA reimbursement form in order to request funding after attending the conference. Contact your corresponding class VP of Finance for the SGA reimbursement form.
 5. Reimbursement requests must be submitted within 60 days of the conference/meeting.
 - iv. End of the Year Banquet
 1. Speak with VP of Finance on COP Board
 2. Food orders placed through Mrs. Alisa Danyeur

3. Fundraising

- a. This money is obtained from student fundraising and donations
- b. Each club has a separate account within SGA

- i. This account is different from the account that holds money requested from SGA
 - ii. These funds can be accessed at any time and may be used for any club related activity as long as university rules and regulations are followed
- c. Depositing funds into club account
 - i. Fill out deposit voucher form (found on TU student life online)
 - ii. Submit cash or check only to SGA Finance officer
- d. No separate bank account managed by club allowed
- e. These funds will be carried over to the next year
- f. Fundraising at Touro events need to be cleared with Student Services