

How to properly request money for your design team/engineering organization

The purpose of this guide is to show you how to properly request a reimbursement for your design team or engineering organization through the Student Engineers' Council. The process is not very difficult but many people do not know where to find the reimbursement form and or how to properly fill it out. These instructions will walk you through step by step on how to gain access to your awarded funds. In order to complete these instructions, you will need the following:

- A computer
- Access to the "SEC shared Funds" Google Spreadsheet
- If you are a Design Team you will need your 6 digit account number (It begins with an 8)
- If you are an engineering organization you will need the name and address of the person you want the check made payable to
- Receipts from your purchase (can be pictures of the receipt)

Note: Student Engineers' Council (SEC), Engineering Organization Fund (EOF), and Design Team Endowment (DTE)

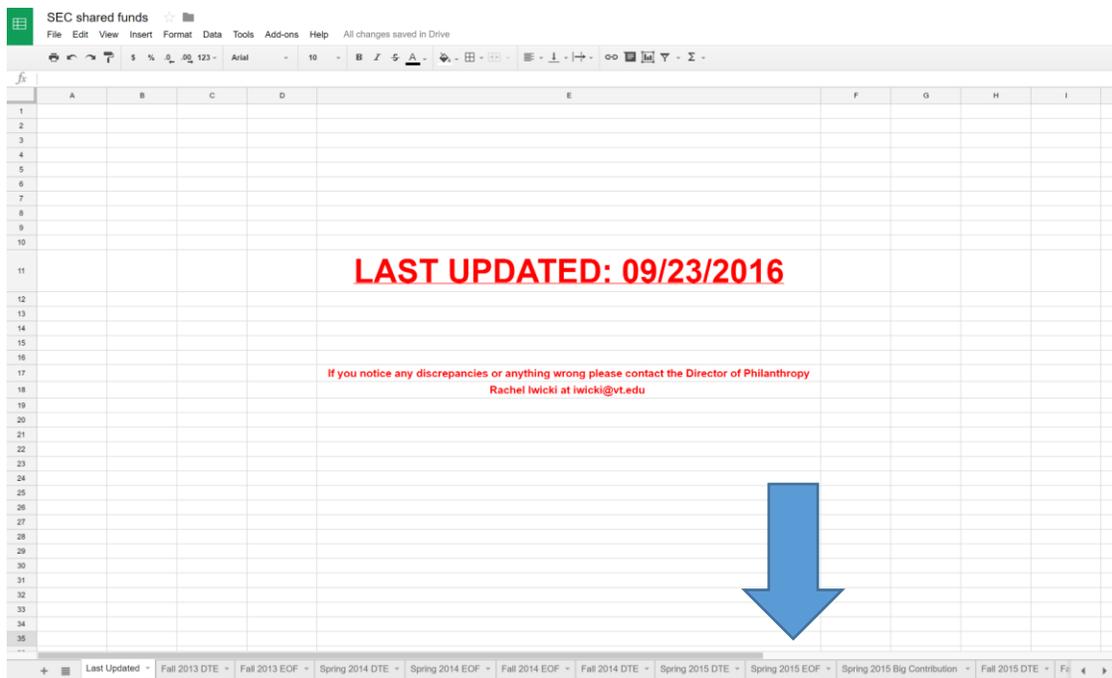
So you are asking yourself, my design team/engineering organization won ___ amount of money, now how do I access it?

Task 1: Access the SEC Funds Google Spreadsheet and see which fund you want to take the money out of.

Step 1: First you must have already been added to the google spreadsheet "SEC Shared Funds".

Note: If you have not and wish to be, please email the Director of Philanthropy for access.

Step 2: Once you have gained access to the spreadsheet, open the specific fund you wish to view. The tabs can be found at the bottom of the spreadsheet.



Step 3: Once you are on the tab for the specific fund you wish to use, find your design team/engineering organization's name in the row.

Step 4: Ensure that there is enough money left in your awarded fund to cover the money you are requesting.

Note: Ensure you are looking at the "Amount Left" column and not the "Amount Awarded". Also ensure that the fund has not expired! If there is not enough money left in your account after you request the reimbursement, the Director of Philanthropy will take the money out of another fund if possible or will only reimburse the money that is left in the fund.

Fall 2014 EOF Funds expire October 2nd, 2015

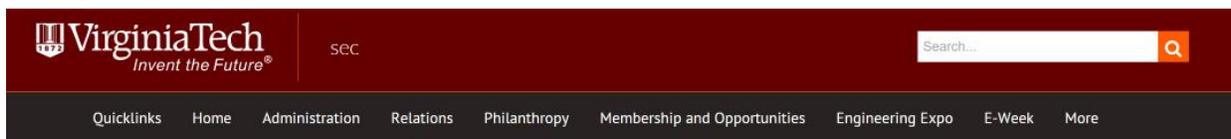
Organization	Amount Allotted	Amount Remaining	Reimbursement #1
Your Team/Organization	\$2,000	\$1,500.00	\$500.00

Step 5: Once you have determined the fund your team/organization wishes to use and you have determined that your team/organization has enough money to cover the reimbursement it is time to move on to paper work!

Task 2: Locating and Downloading the Reimbursement Form

Step 1: Go to www.sec.vt.edu.

Step 2: On the banner of the web page click on the tab labeled philanthropy.



Student Engineers Council

Student Engineers' Council



Step 3: Scroll down and find the “SEC Reimbursement Form” link

For Member Society and Design Teams

Design Team Application

Engineering Organization Fund Application

SEC Reimbursement Form



SEC Reimbursement Instructions

Step 4: Download the attached file. Congratulations! It is now time to fill out the document.

Task 4. Filling out the Reimbursement Form

WARNING: Failure to follow the next steps will result in a delay in reimbursement.

Step 1: Open up the SEC Reimbursement Form. The document should look like the image below.

Date Submitted: _____

SEC Reimbursement Form

Please fill out the information below in its entirety to receive a reimbursement. In addition to completing this form, you must include the receipts from your purchases. Please e-mail this form and the receipts/invoices to the current Director of Philanthropy.

General Information Name (First and Last) _____

E-mail _____

Organization/Department _____

Total Amount Requested for Reimbursement _____

Reimbursement type and semester/year of award (Engineering Organization Fund, Design Team Endowment, Big Contribution) Ex. EOF, Fall 2012

For Engineering Organization Funds or Big Contribution:

Payee Name(s) _____

E-mail _____

Address of office location (where check can be mailed if necessary)

For Design Team Endowment:

Department/Fund number (unique to your design team) _____

Step 2: Fill out the contact information using YOUR contact information. This will allow the Director of Philanthropy and or the Director of Finance to contact you if needed.

Step 3: Fill out the Reimbursement type with the semester, year, and type of fund you decided on in **Task 1: Step 4.**

Example: _____ Spring 2014 EOF _____

IMPORTANT: If you chose to request a reimbursement for a Design Team Endowment skip to Step 5.

Step 4: Fill out the name and the address under “For Engineering Organization or Big Contribution” for the person that is going to be receiving the check for the reimbursement. Skip Step 5.

Note: The Engineering Organization Fund is reimbursed through the Student Engineers’ Council personal checks. Please fill out the correct contact information and address for the recipient so that the check does not get lost or sent to the wrong address.

For Engineering Organization Funds or Big Contribution:

Payee Name(s) _____

E-mail _____

Address of office location (where check can be mailed if necessary)

Step 5: Fill out your Design Team’s 6-digit account number (it begins with an 8) on the line under “For Design Team Endowment”.

Note: If your team does not know/have the account number or if it begins with anything other than an 8 please contact both the Director of Philanthropy and the Director of Finance.

For Design Team Endowment:

Department/Fund number (unique to your design team) _____

Step 6: Email your Reimbursement form to the Director of Philanthropy. Please include either the pdf copy or the picture of your purchase receipts.

Step 7: Wait for an email response back from the Director of Philanthropy that your reimbursement has been processed and approved. Ensure that the semester, year, and type of fund indicated as well as the amount are all correct (Highlighted Below).

Example: Below is what you should expect to see emailed back to you.

Your Name,

I have received and approved your reimbursement for **Fall 2015 EOF** for **\$\$\$\$**. I have sent the information to our Director of Finance, Walker Olsen, who will be in charge of distributing the money. If you have any questions, feel free to email me or our Director of Finance at woelark4@vt.edu.

Step 8: Email the Director of Philanthropy if you have any concerns or questions.

Note: The Director of Philanthropy and Finance have a 1-2 week turn around period to process and distribute the funds. Please be patient before sending an email regarding the status of your reimbursement.

Conclusion: Congratulations! You have now successfully and properly filled out and submitted a reimbursement form to the Student Engineers' Council. As mentioned before please be patient with your reimbursement requests. You can expect the Director of Philanthropy to process your request within two weeks of submitting it. If you have any questions or concerns, please do not hesitate to contact the Director of Philanthropy.