Welcome to our electronic guide to navigating student organization finances on BuffConnect.

**Optimal Browsers:** Chrome or Firefox

Please utilize the table of contents below to find instructions for what you are hoping to achieve. You can click directly on an item to be taken to that section.

https://colorado.presence.io

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Getting Finance Access

Only ORGANIZATION ADMINISTRATORS will have access to view your finances.

To check if you are an organization administrator:

1. Visit BuffConnect (https://colorado.presence.io) and log in using the button located in the upper right-hand corner.

2. Once logged in you should see a new menu item - the Admin Dashboard.
If you have this menu item, you have finance access for your student organization. Click to visit the finance page and see your organization.

If you do not have this item, you do not have access to your organization’s finances.

To be listed as an organization administrator:

Recognized Student Organizations are required to re-register with the Center for Student Involvement annually. During this process, leaders for your organization are able to list who they would like to have serve as organization administrators and manage organization finances.

Your organization is allowed to have a maximum of three organization administrators.

To ensure security for student organizations, only current organization administrators may authorize the addition of different/additional administrators. The Center for Student Involvement can assist you with getting contact information of currently listed administrators - otherwise reach out to them to be added.
Revenue Fund Account

Navigating to your Revenue Fund Account

1. While logged in to BuffConnect as an organization administrator, click the **ADMIN DASHBOARD** menu item in the upper right corner.

2. In the dashboard, you will see a left-hand menu item for **FINANCE**.

3. Click the plus sign icon (+) next to your organization name to expand accounts. Click **REVENUE FUND**.
Depositing Money

1. From inside your revenue fund account, look on the upper right-hand side for your CREATE TRANSACTION menu.

2. Clicking on DEPOSIT will bring up the appropriate form, which needs to be completed in full and submitted.

3. After submitting your DEPOSIT form, be sure to bring in or mail (do not mail cash) the physical deposit money into the Center for Student Involvement office (UMC 330).
From inside your revenue fund account, look on the upper right-hand side for your **CREATE TRANSACTION** menu.

Clicking on **EXPENDITURE** will bring up the form to authorize spending or reimbursements.

Select **REVENUE FUND** as the funding type at the beginning of the form.

**Revenue Fund**: Self generated student organization funds disbursed for the purposes of supporting organization operations and activities.

Name your request using the provided format: **What / Who / How** - Example: “Pizza for meeting / Cosmos / CU Credit Card by phone”

**WHAT** = What is the item being purchased/paid for

**WHO** = Who is being paid or who is doing the paying

**HOW** = What method was used or needs to be used to complete this payment
After filling out organization information, complete all questions related to **REVENUE FUND REQUEST** on the left-hand side.

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### Revenue Fund Request

<table>
<thead>
<tr>
<th>Has this purchase already been made?</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ON CAMPUS/ DEPARTMENT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOOD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total cost of goods to be purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td>LESS THAN $5,000</td>
</tr>
</tbody>
</table>

---

**DISCLAIMER:** Some information requested in the following form may be required to complete the requested transaction. This information is only used by administrators after the form is submitted, and will only be used as the transaction. If you have a question about why a certain piece of information is needed, reach out to csifinance@colorado.edu.

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**Information to aid in answering questions to the left:**

**Why does it matter if the purchaser is a CU non-student employee?**

If a CU employee, who is not a student, made a purchase on your organization’s behalf, whether it’s for personal or professional purposes, the process to handle those transactions are very different than if purchased by a student or someone who is not a University employee.

**Purchase Type:**

*Good* is a tangible item that you can purchase or rent. Examples of goods can include office supplies, office equipment, and other supplies. If you are purchasing branded materials and the price of the service is part of the purchase, processing fees for these transactions would also be included.

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Based on your answers, additional questions may appear. Be as detailed as possible in answering them to avoid delays in receiving your payment.

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Add all items needing payment in the **LINE ITEMS** section, completing all fields and being sure to upload supplemental screenshots or documents as needed.

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**LINE ITEM REQUEST**

<table>
<thead>
<tr>
<th>Title</th>
<th>Memo</th>
<th>Budget</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Expenditure Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload File</td>
</tr>
</tbody>
</table>

---

Page 7
Make sure that **REVENUE FUND** is selected in the **BUDGET** field of your line items.

When all items of form have been completed, scroll to the top of the page to **SUBMIT FOR APPROVAL**.

After submitting, your request will be sent to CSI Finance Staff.

You will be contacted if additional information is needed or to provide next steps.
Budget Account

Navigating to your Budget Account

1. While logged in to BuffConnect as an organization administrator, click the **ADMIN DASHBOARD** menu item in the upper right corner.

2. In the dashboard, click the left-hand menu item for **FINANCE**.

3. Click the plus sign icon (+) next to your organization name to expand accounts.

<table>
<thead>
<tr>
<th>Account</th>
<th>Budget</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center for Student Involvement Funds</td>
<td>$70.51</td>
<td>$2,196.15</td>
</tr>
<tr>
<td>Revenue Fund</td>
<td>$67.51</td>
<td>$96.15</td>
</tr>
<tr>
<td>Allocated Funds</td>
<td>$3.00</td>
<td>$1,050.00</td>
</tr>
</tbody>
</table>
To view and interact with already **ALLOCATED BUDGETS**: 
Click the plus sign icon (+) next to **ALLOCATED FUNDS** and select the desired budget.

To request a **NEW BUDGET**:
Click directly on **ALLOCATED FUNDS** and follow guides in this document for requesting a budget.

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### Requesting a Budget

1. While logged in to BuffConnect as an organization administrator, and in the admin dashboard’s finance section, click on **ALLOCATED FUNDS**.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Available</th>
<th>Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center for Student Involvement Funds</td>
<td>$70.51</td>
<td>$2,196.15</td>
</tr>
<tr>
<td>Revenue Fund</td>
<td>$67.51</td>
<td>$96.15</td>
</tr>
<tr>
<td>Allocated Funds</td>
<td>$3.00</td>
<td>$1,050.00</td>
</tr>
</tbody>
</table>

2. Click on the **CREATE TRANSACTION** menu near the upper right of this section. Click on **EXPENDITURE** to bring up the request form.
Read and respond to all questions as thoroughly as possible. Your first option will be to select **OPERATIONAL**, **EVENT**, or **TRAVEL** as the funding type.

### Details

This form is used by student organizations to submit Funding Board Requests OR to request disbursements from their self generated Revenue Fund.

**For the purposes of student organization submitting funding requests, the following are definition of funding types:**

**Event**: An educational, awareness, outreach, or other type of activity put on by your organization that is outside of your normal meetings and is meant to engage the entire CU student population, not just the members of your organization.

**Travel**: A conference, competition, or outing that contributes to deepening member knowledge and/or skill around the subject/mission of your organization that requires your organization to leave the local area for one night or more. Travel expenses include airfare, lodging, ground transportation, and conference or competition fees.

**Operations**: Materials or other costs that support your organization in the completion of your mission and the regular ongoing operation of your organization. Typical costs include marketing and promotions, supplies for regular meetings, and group dues to a national organization that provides support, resources, and educational opportunities to all members.

**Student Bar Association Funding**: For organizations affiliated with the Law School and the Student Bar Association ONLY.

**Revenue Fund**: Self generated student organization funds disbursed for the purposes of supporting organization operations and activities.

### Funding request type

<table>
<thead>
<tr>
<th>EVENT</th>
<th>TRAVEL</th>
<th>OPERATIONAL</th>
<th>STUDENT BAR ASSOCIATION</th>
<th>CSI OFFICE USE ONLY</th>
<th>REVENUE FUND</th>
</tr>
</thead>
</table>

You may select:  
- Each individual event, travel trip, or semesterly operational request must be submitted as separate requests.

### 4

Respond to all generic questions about your student organization, located in the middle section of the form.

**Title**

**Select your organization:**

**Name of organization contact for request**

**Organization contact email address**

Email must be from one of the these domains: '@colorado.edu'.

### Requesting Organization Details

<table>
<thead>
<tr>
<th>Is your organization in &quot;good&quot; standing with CSI?</th>
<th>In your organization New or Established?</th>
<th>Have you discussed this funding request with a member of the Center for Student Involvement staff?</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>NO</td>
<td>NEW</td>
</tr>
</tbody>
</table>

- An organization becomes Established after 12 months of continuous recognition with CSI

**Number of Student members**

**Number of non-student members**

**Current Revenue Fund balance**
Complete **LINE ITEMS** for each item you wish to request money for. Include attachments (screenshots, emails, etc) to justify the amount you are requesting. Be specific!

Provide documentation to support the costs for which you are requesting funds by utilizing the Attachment Fields below.

The **AMOUNT** should exactly match what is listed in your attachments. Funding boards need specifics, not general feelings about how much money you want.

Utilize the **ADD** button to add more line items to your request.

Do not fill out any portion of the form that is not intended for you. This includes the CSI Liaison Approval and Funding Board Approval sections. You will see a warning on the form when these sections are next.

STOP! **STUDENT ORGANIZATIONS: DO NOT FILL OUT CSI APPROVAL OR FUNDING BOARD APPROVAL QUESTIONS**
Once you have completed all portions of the form, scroll to the top and click the green **SUBMIT FOR APPROVAL** button.

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**Once submitted:**
- Budget will be sent to your organization’s liaison within the Center for Student Involvement.
- If changes are needed, or if you have not spoken your liaison about this request, you may be contacted to clarify and provide changes.

**After your budget has been reviewed by a CSI liaison:**
- Budget will be sent to funding board(s) for review.
- You will be invited to attend a funding board hearing.
- Funding board will decide if and/or how much funding you will receive.
- You will attend a pre-spending meeting with CSI Finance member to learn about how to spend your funding appropriately.

**DO NOT** spend money before you have fully worked through this process.

If you are unsure who your CSI liaison is, please refer to: [https://www.colorado.edu/involvement/rsostaff](https://www.colorado.edu/involvement/rsostaff)
1. Navigate to your **ADMIN DASHBOARD > FINANCE > ALLOCATED FUNDS**. From here you will click on the specific budget you wish to spend money from.

2. Click on the **CREATE TRANSACTION** menu and select **RECONCILIATION**.
Name your request using the provided format: 
**What / Who / How** - Example: “Pizza for meeting / Cosmos / CU Credit Card by phone”

<table>
<thead>
<tr>
<th>WHAT</th>
<th>WHO</th>
<th>HOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the item being purchased/paid for</td>
<td>Who is being paid or who is doing the paying</td>
<td>What method was used or needs to be used to complete this payment</td>
</tr>
</tbody>
</table>

Ensure your budget has been selected under **APPROVED EXPENDITURES** section and complete all questions. Be detailed and include attachments.

Add any additional items by using the **ADD** button along the right-hand side.

Reconciliation Items

<table>
<thead>
<tr>
<th>Approved Expenditures</th>
<th>Actual Amount Spent</th>
<th>$20.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Memo</td>
<td>Receipt/Invoice/Shopping Cart</td>
<td>Upload File</td>
</tr>
</tbody>
</table>

For items already purchased, you must attach itemized receipts and proof of payment above. An itemized receipt contains the below information. You will find an example of an approved itemized receipt under Files > Finance > Itemized Receipts

- Business's Name
- Date

Failure to provide appropriate documentation/attachments may delay your request. If you have concerns or questions about what you should be including please contact your CSI liaison or finance staff.
After submitting, your request will be sent to CSI Finance Staff.

You will be contacted if additional information is needed or to provide next steps.
Supplemental Documentation

Printing Requests

Print requests from the CSI Resource Center are one of the more common financial interactions. To request printing you will follow the instructions for “Spending Money” located within this document up until the point of answering any purchase-specific questions. Then:

1. Select options to indicate that the purchase has not yet been made and will be from an on-campus source.

Has this purchase already been made?
- YES
- NO

Vendor Type
- ON CAMPUS/DEPARTMENT
- OFF-CAMPUS

DISCLAIMER: Some information requested in the following form may be personal in nature. This information is required to complete the requested transaction. This information is only able to be seen by system administrators after the form is submitted, and will only be used in the manner described to complete the transaction. If you have a question about why a certain piece of information is required, please feel free to reach out to csifinance@colorado.edu.

Information to aid in answering questions to the left:

2. Select that this request is for the CSI Resource Center. This will populate further questions specific to printing.

ON CAMPUS VENDOR/DEPARTMENT PURCHASE

Is this request for printing at the CSI Resource Center?
- YES
- NO

Please allow 1-2 business days for print requests to be processed. Lack of appropriate funding (either in your budget or the payment amount you are requesting), incorrectly formatted files, or incomplete information can delay processing requests.

- If you are purchasing from your Revenue Fund account please remember that sales tax (8.845% as of Jan 2020) applies. Please make sure to account for this in the payment amount you are requesting.

- If you are not the appropriate person to contact regarding questions related to this print request, please include a phone number and email for that person in the DETAILS box below to avoid further processing delays.

When do you need the request completed?

Above are our most common print sizes and pricing. Other sizes and services are available. If you don't see what you are looking for, please contact csiresource@colorado.edu to inquire about your specific needs, including possible ordering times, processing time, and additional costs.

Please indicate paper size(s) and finishing option(s). Mark as many as apply. If none of the sizes listed apply, please mark other. List quantities and special instructions, including any specialty colors or weights of paper, in the Print Details section.
Answer all printing questions and upload necessary files. If files are too large you may email them directly to csiresource@colorado.edu

When do you need the request completed?
As soon as possible

Above are our most common print sizes and pricing. Other sizes and services are available. If you don’t see what you are looking for, please contact csiresource@colorado.edu to inquire about your specific needs, including possible ordering times, processing time, and additional costs.

Please indicate paper size(s) and finishing option(s). Mark as many as apply. If none of the sizes listed apply, please mark other. List quantities and special instructions, including any specialty colors or weights of paper, in the Print Details section.

Paper size(s). Select all that apply
11 x 17 (tabloid) □

Finishing options. Select all that apply
Color □ Single-sided □

Sizes listed in inches.

Print Details: Please be as specific as possible to avoid errors in printing or delays.

200 copies of attached poster.

Complete line-item section with generic information and printing cost. Prices can be found listed here: Printing & Services Sheet

---------------------------- LINE ITEM REQUEST -----------------------------

Title *
Printing

Memo *
printing in resource center

Budget *
Revenue Fund
Amount Available ▲
$114.13

CSI Finance Staff Notes/ Comments

Expenditure Attachment
Upload File ▲

Amount *

$40.00

After you submit a print request our resource center staff will receive it. They will contact you if there are any questions or concerns.

You will be emailed when the job is complete and available for pickup. Please allow 24 hours minimum for this to be completed, although we strive to move more quickly than that.
Frequently Asked Questions
For an up-to-date listing of frequently asked questions, please visit:
https://www.colorado.edu/involvement/student-organizations/faq-spending

Policies and Procedures
For more details about your accounts and how you can use them, please visit: https://www.colorado.edu/involvement/student-organizations/accounts

Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Dashboard</td>
<td>The &quot;behind the scenes&quot; section of BuffConnect where you can access finances, organization updates, and other features. You will only be able to access this if you are an organization administrator.</td>
</tr>
<tr>
<td>Allocated Funds</td>
<td>The broad category within BuffConnect's finance section for any budgets you have requested from on-campus funding sources.</td>
</tr>
<tr>
<td>Budget</td>
<td>Funding you have requested from on-campus sources by submitting an Expenditure Request.</td>
</tr>
<tr>
<td>Center for Student Involvement</td>
<td>The office who manages official processes and trainings for all Recognized Student Organizations. Sometimes referred to as “CSI”.</td>
</tr>
<tr>
<td>Event</td>
<td>Events are put on by student organizations on campus, available for any CU Boulder student to attend. These are usually one-time, larger gatherings - outside the normal operations of your student organizations.</td>
</tr>
<tr>
<td>Expenditure Request</td>
<td>The form you utilize to request a budget from an on-campus funding sources.</td>
</tr>
<tr>
<td>Operational</td>
<td>Operational activities are anything that your student organization needs to exist on a weekly basis. This could include printing money, equipment, supplies, or minor fees paid for other goods/services.</td>
</tr>
<tr>
<td>Organization Administrator</td>
<td>This is a person who has finance access for your student organization. Your organization has a minimum of one organization administrator and can have a maximum of three. You can only be an organization administrator for one recognized student organization at a time.</td>
</tr>
<tr>
<td>Recognized Student Organization</td>
<td>Sometimes referred to as “RSO”. Any student organization who has gone through the official recognition process with the Center for Student Involvement is considered a recognized student organization.</td>
</tr>
<tr>
<td>Revenue Fund</td>
<td>This is the generic account within BuffConnect that functions similarly to a bank account. This is a great location for fundraised money, dues, or other funding you gather from sources that are not on-campus funding boards.</td>
</tr>
<tr>
<td>Travel</td>
<td>Travel is considered a one-time event outside the normal weekly operations of your student organization. This could include conferences, competitions, site-visits, or other similar trips that benefit the mission of your organization.</td>
</tr>
</tbody>
</table>

Contact Information
Center for Student Involvement
University Memorial Center, Room 330
(303) 492-6366
csifinance@colorado.edu