PROMOTIONAL ITEMS/ SUPPLIES - DOCUMENTATION NEEDED PURCHASES UNDER $500.00

For all SGA organizations, all items must be approved by SGA prior to ordering or else no reimbursement will be granted.

REIMBURSEMENT TO STUDENT FOR PURCHASES UNDER $500.00
➤ Completed SGA funding requisition form (top portion only) if you are a SGA recognized organization
➤ Completed check requisition form including fund, organization and account number
➤ Original invoice from establishment showing quantity, price per item, shipping charges, total cost and payment method
➤ Once approved, if payment was made
  • by cash, submit original receipt showing name and address of establishment where goods were purchased. Copied receipts well not be accepted.
  • by credit card, submit credit card statement showing transaction, amount, your name, last four digits of credit card number and front copy of credit card used.
  • by debit card, submit debit statement showing transaction, amount, your name, digits of debit account matching payment method on invoice and front copy of debit card.

PAYMENT TO VENDOR FOR PURCHASES UNDER $500.00
➤ Completed SGA funding requisition form (top portion only) if you are a SGA recognized organization
➤ Completed check requisition form including fund, organization and account number
➤ Original invoice from establishment showing quantity, price per item, shipping charges, and total cost
➤ W-9 filled out by the vendor
➤ Any necessary insurance certificates, permits, or contracts

PURCHASING WITH OFFICE CREDIT CARD
If purchasing online, bring in order form and fill out SGA funding requisition form. When approved by SGA’s comptroller, you will be notified to return to the office and get the SGA Amex card from Robyn Kaplan. You will be able to place the order in the OSLA office.

STUDENT ORGANIZATIONAL INFORMATION

Name: ________________________________
Contact email: ____________________________
Contact phone: ____________________________

OSLA RESPONSIBILITY

Name of staff in-taking paperwork: ____________________________
Date paperwork was received: ____________________________
Copy made by: ____________________________
Copy given to student and original to club advisor: ____________________________
Originals given to: ____________________________ Sent to AP: ____________________________
HOFSRA UNIVERSITY STUDENT GOVERNMENT ASSOCIATION

FUNDING REQUISITION

Organization: ___________________________ Date: ___________________ Date Received: ___________________

Organization Contact Person: ___________________________ Phone #: ___________________________

Email: _____________________________________________

Detailed Explanation for Request: _____________________________________________________________

______________________________________________________________________________________

Amount of Request: $ ___________________ Payment Required by: _________________________________

Date of Event: __________________________ Location: ____________________________ Ticket Price: ____________________

METHOD OF PAYMENT

☐ Purchase Request – for items over $500.00 attach purchase request and quote. If quote is over $2,500, three bids must accompany request.

☐ Check Request – attach invoice, receipts for reimbursement & credit card statement, single, guest lecturer or musical accompaniment contract.

☐ Budget Transfer – attach HU Budget Transfer Form or Lackmann Food Service Invoice.

☐ American Express Card – Return card along with all documentation regarding Amex Purchase.

APPROVALS

OSLA Program Advisor: ________________________________________________________________

Fitness Center Advisor: ______________________________________________________________

MISPO Program Advisor: _____________________________________________________________

SGA Bookkeeper: ___________________________/__________

Balance after this expense: _______________________________________________________________________

SGA Comptroller: _________________________________________________________________

Appropriated: ____________________________/__________

SGA Advisor: ______________________________________________________________

Executive Director OSLA: __________________________________________________________

COMMENTS: _________________________________________________________________

☐ Approved ___________________________ Denied ___________________________ Modified ____________________________

Rev 08/2012
**W-9 Request for Taxpayer Identification Number and Certification**

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

**Part II Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out Item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, Item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an IRA, and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners’ share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,