Instructions for Applying for SORF in CollegiateLink

Prerequisites

The following is required before treasurer is eligible to apply for SORF funding on behalf of his/her organization:

- Organization needs to be registered with the Registered Organizations Office in the CollegiateLink database with currently active President/Primary Contact, Treasurer, and 3 Authorized Agents listed as Student Organization Officers.
- Organization treasurer must review online Treasurer’s Workshop at https://compass.illinois.edu, and complete the Treasurer’s and SORF Quizzes with a score of 100%.
- Organization is required to have an established RSO Account with a zero or positive balance prior to submitting a request to SORF.

Questions regarding registration, officers, Treasurers Workshop, RSO Account can be directed to the Registered Organizations Office (iurso@illinois.edu or 244-2357). Questions regarding SORF can be directed to sorf@illinois.edu or 244-2357.

How to Apply

The treasurer is responsible for managing organization finances with SORF being a funding source for RSOs. Upon submission of required documentation by the treasurer, the SORF allocation is transferred into the RSO Account and a check processed to the designated payee. For this reason, only the treasurer is allowed to submit a SORF request on behalf of the organization and its members.

It is the responsibility of the organization to read, understand, and comply with SORF deadlines, policies, procedures, and processes. Because SORF operation is subject to change, it is highly recommended that applicants read SORF information before submitting a funding request. Information and can be found at http://www.union.illinois.edu/involvement/sorf.

To apply for SORF funding, organization treasurer must first log into CollegiateLink following the steps below:

1. Log into CollegiateLink using Net ID & AD password (http://illinois.collegiatelink.net)
2. Once logged in, you are automatically taken to your personal Home page.
3. In the Browse Organizations or Jump to text box, type your organization name and select “Go.”

As a confirmed treasurer, once you log in, you will have access to features that allow you to manage information and finances for your organization. These functions are located on the right-hand side of the Home page. To submit a SORF funding request, proceed by following the steps outlined below:

1. Go to “Finance” and move your cursor over the down arrow to get more options.
2. Select “Create a Funding Request.”
3. The funding request has a lot of fields. The instructions below will break the funding request into 3 parts, providing information on how to complete each section along with a visual representation of what you will see on the screen. Text boxes with a red asterisk (*) indicates a required field. A field with up and down arrows (^^) that are highlighted in blue indicates that there is more information that you can scroll to see and complete. The first five fields of the funding request that you must complete include:
   a. *Organization Name* – Confirm your organization name by typing name exactly as registered with the Registered Organizations Office. Check the RSO Account field for spelling of organization name in CollegiateLink system. Abbreviations will not be accepted!
   b. *Total SORF Request Amount* – This system does NOT automatically calculate any dollar amount that you enter. **You must manually tabulate the [\$ Sub-Total Amounts \$] from each category you are applying for and enter the total requested amount for this specific application in this field.** For example, if you are requesting money in three different funding categories to include $5000 for Contractual Services, $200 for Publications/Communications, and $2000 for Rental, you must enter $7200.00 in this text box. Make sure to correctly enter the amount that you are requesting from SORF. Totals in all cases should be actual or estimated cost of the event or activity. Let the SORF Board calculate and apply their Standards.
   c. *RSO Account* – When your organization has an established RSO Account and is given access to apply for SORF funding, this box will automatically display the name of your organization as registered. If this information is not displayed, check with the Registered Organizations Office about an account.
   d. *Category* – SORF funding categories include Contractual Services, Equipment, Film, Publications/Communications, Rental, and Travel. Indicate whether you are applying for one category or multiple categories. For example, if you are requesting money in three different funding categories within the application, such as Contractual Services, Publications/Communications, and Rental, you must select “Applying for MULTIPLE Categories.” If you are requesting money for 4 competitive events, they are all within the travel category, so you would select “Applying for Travel ONLY.” This allows the Board member to know what to look for in your application as he/she performs a pre-review.
   e. **Request Summary** – This area is where you have the opportunity to summarize your entire application, explaining to the SORF Board what you are applying for, why it is necessary, relevant information you feel would be helpful to the Board, etc.
4. The **next five fields** (field numbers beginning with 1) of the funding request that you must complete include:

   a. **Funding Period** – Select the appropriate funding period that you want to wish to apply for. Be alert to specific deadlines set in place for International travel. If you are resubmitting an application for an event/activity that has already occurred, you must select the funding period that SORF is currently reviewing applications for.

   b. **Application Information** – Highlights SORF information and reiterates the importance of understanding SORF deadlines, policies, procedures, and processes prior to applying for funding. Again, SORF information can be found at [http://www.union.illinois.edu/involvement/sorf](http://www.union.illinois.edu/involvement/sorf).

   c. **RSO Mission Statement** – Enter organization mission statement and state how potential funding of event/activity ties into the mission of your RSO.

   d. **Organization Finances** – Provide financial information such as anticipated funding sources, co-sponsors, and how your organization will cover remaining costs not covered by SORF.

   e. **Treasurer Email** – Enter treasurer’s University email (@illinois.edu). A SORF Board member will contact treasurer and president for clarification of information as it relates to the funding request.

   f. **President Email** – Enter president’s University email (@illinois.edu). A SORF Board member will contact treasurer and president for clarification of information as it relates to the funding request.

5. The **remaining fields** in the funding request are **category specific** as it relates to Contractual Services, Film, Permanent Equipment, Publications/Communications, Rental, and Travel. **Only complete the information within each funding category that you are requesting SORF funds for, leave others blank.** As you scroll through the application, the first category is Contractual Services, followed by Publications/Communications, Equipment, Rentals, Films, and Travel. **You can only apply for multiple categories with up to 5 Contractual Services, 3 Publications/Communications, 10 Equipment items, 4 Rentals, 3 Films, and 4 Travels per funding request.** If you need to apply for more than the set number of items within each category of the application, you must complete an additional funding request to accommodate the number of items you are applying for. If this applies to your group, it is allowable to submit more than one application for the same funding period to accommodate the number of items you are applying for. If you submit more than one application/request in a funding period, it will still only
count as one against your limit. A field titled Allocation Comments is the last field of each category. This is the funding decision that is entered in at the SORF allocation meeting. These comments will be viewable by treasurer.

a. **Contractual Services (Field numbers beginning with 2.)** – Organizations can apply for up to 5 contractual services per SORF funding request. Information must be completed for each contracted individual, group, business, company, agent, etc. requested. If requesting more than 5 contractual services, you must complete an additional SORF funding request to accommodate the number of contractual services you are applying for.

i. **Name** – Provide name of Individual, Group, Business, or Company being contracted. In some cases, an agent will manage contracts on behalf of an individual or group. If this applies to whom you are contracting, you must also include agent information.

ii. **Type** – From the pull-down menu, indicate what type of contractual services you are applying for such as Speaker/Lecturer, Performer, Referee/Judge, Instructor, or Other.

iii. **Synopsis of Qualifications** – Indicate what makes this individual qualified. Include a website, resume, biography, research, area of expertise, specialization, years of involvement in profession/area, etc.

iv. **Event Information** – Complete information about the event in which contracted individual, group, business, or company will provide services. Indicate the date of event to include month/day/year, location (preferably confirmed), and purpose/description of the event.

v. **Expense Information** – Provide calculations for costs associated with contract such as fee, transportation, lodging, and total cost. For example, contract fee = $5000, Transportation = $534 for airfare, and 1 night stay at the I-Hotel is $175.

vi. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover fees, transportation, and lodging expenses for each individual contractual service request.

vii. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.

viii. **Allocation Comments** – This field is **completed by the SORF Board** during the allocation meeting. Their funding decision information will be entered here.
b. **Publications/Communications (Field numbers beginning with 3.)** – Organizations can apply for up to 3 publications/communications per SORF funding request. Information must be completed for each publication/communication requested. If requesting more than 3 publications/communications, you must complete an additional SORF funding request to accommodate the number of publications/communications you are applying for.

   i. **Date** – Indicate the date of publication or distribution of materials being printed.
   
   ii. **Type** – From the pull-down menu, indicate what type of publications/communications you are applying for such as flyers/posters, newsletters, DI Ads, journals, magazines, newspapers, or other.
   
   iii. **Purpose/Event Description** – Explain the purpose of the requested materials. If advertising an event, provide a brief description of the event.
   
   iv. **Expense Information** – Provide calculations for costs associated with publications/communications such as number of copies, cost/copy, and total cost.
   
   v. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover publication/communication expenses for each individual request.
   
   vi. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.
   
   vii. **Allocation Comments** – This field is completed by the SORF Board during the allocation meeting. Their funding decision information will be entered here.

   
   

c. **Equipment (Field numbers beginning with 4.)** - Organizations can apply for up to 10 equipment items per SORF funding request. Information must be completed for each piece of equipment requested. If requesting more than 10 equipment items, you must complete an additional SORF funding request to accommodate the number of equipment items you are applying for.

   i. **Item Description/Purpose** – Describe the piece of equipment and/or explain the purpose of the requested materials.
   
   ii. **Expense Information** – Provide calculations for costs associated with equipment such as number of items, cost/item, and total cost.
   
   iii. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover equipment expenses for each individual request.
iv. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.

v. **Allocation Comments** – This field is completed by the SORF Board during the allocation meeting. Their funding decision information will be entered here.

<table>
<thead>
<tr>
<th>4-a) EQUIPMENT #1</th>
<th>Item Description/Purpose:</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-a-i) Expense Information</td>
<td># Items: Cost/Item: $ Total Cost: $</td>
</tr>
<tr>
<td>4-a-ii) $ Sub-Total #1 $</td>
<td></td>
</tr>
<tr>
<td>4-a-iii) Additional Information</td>
<td></td>
</tr>
<tr>
<td>4-a-v) Allocation Comments</td>
<td></td>
</tr>
</tbody>
</table>

d. **Rental (Field numbers beginning with 5.)** - Organizations can apply for up to 4 rentals per SORF funding request. Information must be completed for each rental requested. If requesting more than 4 rentals, you must complete an additional SORF funding request to accommodate the number rentals you are applying for.

i. **Type** – Indicate what type of rental you are applying for such as facility, equipment, or services.

ii. **Item** – Describe the specific item you are renting, such as projectionist, A/V tech equipment, etc.

iii. **University Rental or Non-University Rental** – Indicate whether rental is from the University or a vendor outside of the University.

iv. **Event Information** - Complete information about the event in which rental is requested. Indicate the date of event to include month/day/year, location (preferably confirmed), and purpose/description of the event.

v. **Expense Information** – Provide calculations for costs associated with rental costs such as facility, equipment, services, and total cost.

vi. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover rental expenses for each individual rental request.

vii. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.

viii. **Allocation Comments** – This field is completed by the SORF Board during the allocation meeting. Their funding decision information will be entered here.
e. **Film (Field numbers beginning with 6.)** - Organizations can apply for up to 3 films per SORF funding request. Information must be completed for each rental requested. If requesting more than 3 films, complete an additional SORF Funding Request to accommodate the number films you are applying for.
   1. **Title & Cost** – Indicate the title and cost for viewing rights to show the film.
   2. **Event Information** - Complete information about the event for which film is requested. Indicate the date of event to include month/day/year, location (preferably confirmed), and purpose/description of the event.
   3. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover film viewing right expenses for each individual film request.
   4. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.
   5. **Allocation Comments** – This field is completed by the SORF Board during the allocation meeting. Their funding decision information will be entered here.

f. **Travel (Field numbers beginning with 7.)** - Organizations can apply for travel expenses for a maximum of 4 events per SORF funding request. Information must be completed for each rental requested. SORF only funds 4 travels per year per organization.
   1. **Number of Travelers, Mode of Transportation, Destination & One-Way Mileage** – Indicate the number of members traveling on the trip and mode of transportation such as airplane,
automobile, bus, train, etc. Provide destination group is traveling to for the event/activity. Provide one-way mileage (in miles) from Champaign-Urbana to destination.

ii. **Type** - From the pull-down menu, indicate what type of travel you are applying for such as educational, performance, service, or competitive.

iii. **Event Information** - Complete information about the event in which travel is requested. Indicate the dates of travel to include month/day/year of departure and return, purpose/description of travel, and itinerary/schedule/website information.

iv. **Expense Information** – Provide calculations for costs associated with travel to include individual or team registration fee, transportation, lodging (w/ # rooms and # nights), international travel insurance, and total cost.

v. **$ Sub-Total $** - Indicate the subtotal amount that you are requesting from SORF to cover expenses for each individual travel request such as registration fees, transportation, lodging, and international travel insurance (if applicable).

vi. **Additional Information** – This optional area is open to provide information about this specific request, include information that is not included elsewhere in your request, etc.

vii. **Allocation Comments** – This field is completed by the SORF Board during the allocation meeting. Their funding decision information will be entered here.

g. *The last statement is to confirm that you have read and understand SORF deadlines, policies, procedures, and processes. From the pull-down menu, select yes or no in response to this question.*

h. Select “Create” to submit your funding request.
i. You will receive confirmation if submitted successfully.

j. Once submitted, you can NOT alter any part of your funding request!

k. Note: If you chose to cancel your request, the request will be moved to Stage 5 as a Misc. Catch All and you will receive notification of this.

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Instructions for Checking Application Status in CollegiateLink

Application Status

As the treasurer who submitted the funding request, you will receive an automated email as your application moves through stages of approval (Student Submission, Board Member Pre-Review, SORF Allocation, and Vice Chancellor Approval). Emails are sent from noreply@illinois.collegiatelink.net with the Subject: Stage change for (your organization name). In the example below, the request submitted by ROCK Climbers has moved to Stage 2 and is being reviewed by an assigned SORF Board member.

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The approval stage of a financial request you submitted has changed:

Organization:  ROCK Climbers
Request ID:  1169874
Request Subject:  ROCK Climbers
Current Stage:  Stage 2 - Board Member Pre-Review
Comments:
Your pre-reviewer is ______________, who will be contacting you from their individual email address ______________ about your SORF request. Respond to inquiries in a timely manner as it may impact SORF’s funding decision.

Do not reply to this message.
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Viewing Requests

As treasurer, you have the opportunity to view requests you submitted that are pending, confirmed, denied, or canceled.

Pending requests can be viewed from the Home tab or Organizations tab. When you view requests from the Home tab and you are treasurer of more than one organization, you can see pending finance requests from all organizations you are a treasurer for. If you choose to view a request for a specific organization, you must use the Organizations tab.

1. From the Home tab, scroll down to the bottom of your Home page to My Pending Items. This ONLY allows you to view pending requests not confirmed. Select “View Request” to view desired finance request.
2. To view pending and/or confirmed requests from the Organizations tab for a specific organization, type in your organization name in the Browse Organizations or Jump to text box and select “Go.” Go to “Finance” and move your cursor over the down arrow to get more options and select “Confirmed & Pending.”

a. Select month and year you want to review and select “Show.” This feature will pull up requests by the month and year in which it was submitted.

b. The example below shows two pending requests that are still in Stage 1 and one confirmed request that has been approved.

c. Requests can be canceled by selecting the red circle with the X in the center. Be sure NOT to cancel a confirmed request – you will lose SORF allocation!!

d. Select the magnifying glass icon to view the request in the same format as submitted. The field titled “Allocation Comments” is the last field within each category section you apply for. This field is completed by the SORF Board during the allocation meeting. Their recommended funding decision will be detailed in this section. The piece of paper with the pdf symbol will allow you to view the request as a pdf document, showing additional information associated with the request.
To view denied and/or canceled requests from the Finance menu of a specific organization, type in your organization name in the Browse Organizations or Jump to text box and select “Go.” Go to “Finance” and move your cursor over the down arrow to get more options and select “Denied & Canceled.” You will manage the denied and canceled requests in the same way that you do the confirmed and pending requests.

a. Select month and year you want to review and select “Show.” This feature will pull up requests by the month and year in which it was submitted.

b. Requests can be canceled by selecting the red circle with the X in the center. A request can be canceled before a submission deadline. However, once it has been submitted and allocated funding, do not cancel request! Requests are also viewable in two formats. The magnifying glass will allow you to view the request in the same format as submitted. The piece of paper with the pdf symbol will allow you to view the request as a pdf document but may contain varying content from the original submission.
1. Once SORF receives confirmation from Vice Chancellor regarding their recommendation, the approval stage of the submitted request will be moved to “Stage 4 Vice Chancellor Approval” generating an automated email to the requestor as described above. Next, the status of the financial request will be changed. This again will generate an automated email as seen below indicating the requested amount and approved amount. To view the funding details, you must log into CollegiateLink and follow the steps outlined above to view pending and/or confirmed requests.

On Thu, Apr 29, 2010 at 3:21 PM, <noreply@illinois.collegiatelink.net> wrote:

The status of a financial request you submitted on 04/07/2010 has changed.

Request ID: 1257840
Request Subject: ROCK Climbers
Type: Funding
Status: Completed

Organization: ROCK Climbers
Account: Club Competition
Requested Amount: $8820.00
Approved Amount: $3060.00
Approved By: (Name of staff person who changes status will appear here.)

Comments:

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This email message has been generated by http://illinois.collegiatelink.net/