# Lunch Meetings and How to Submit SAR

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## Lunch Meeting SAR SUPER **HYTQ**

-**First** submit Fast Track, wait for approval, before submitting SAR
-**Be prepared**: have a location, time, and date ready for event. MCC will cover $3/person, up to $150.
-Submit SAR here…**AT LEAST 2 WEEKS** (**10 BUSINESS DAYS**) before event.
-SAR title "**MCC –Lunch Meeting on [ONE WORD SUBJECT]**"
-All lunch meetings are **budget project number 99**
-All lunch meetings will be entered as **Line 13**
-**YOU** are the vendor
-Do **NOT** include your IG name in the title, description, or anywhere. Only do so if this is SG funded.
-Copy/paste/edit for **description**: Lunch meeting on [Subject] with [Dr. ___] on [date] at [time] in [event location]. Expected attendance is [#] people. Funds will be used to purchase [state food to be ordered].
-Do NOT purchase anything until approved by "Student Body Treasurer"
-Turn in receipts within 30 days to SG Finance office
-Submit photos/description on our activity report form

****Description, I am emphasizing to just copy and paste and insert the relevant. *Do **NOT** include your IG name in the description. Do not leave any part out. It will be denied. I understand scheduling time frames can be tight, but you need **ALL** of the bracketed items…even if it means being creative…

**** **AT LEAST 2 WEEKS** (**=14 normal days = 10 BUSINESS DAYS**)    **Please**submit SAR on time. We have no control if SG does not approve the request because it was not submitted by this deadline. We want you to have your lunch meetings...so please let's follow what SG requires.

** **MCC –Lunch Meeting –** **DO NOT** name your IG anywere. [One word subject] may indicate what the IG does, but do not mention the actual Interest group. "MCC" is holding event.

**Terms**
*MCC – Medical College Council*
*SAR – Student Activity Request*
*Docutraq – Website where you submit SAR*

# Lunch meeting process explained

**1st**…There were 2 GOLDEN rules that you must follow in order to get reimbursed (yes everything is done as a reimbursement nothing is paid for in advanced from any SG account). Those rules are:

**#1**:  An SAR must be submitted and approved by the **STUDENT BODY TREASURER** before anything can be purchased

**#2**:  The SAR must be submitted **AT LEAST 2 weeks (10 business days)** before the event takes place. Keep this in mind as you must submit (and get approved) the Fast Track meeting request **before** sending SAR, & you need a location for the event.

**If you do not follow those rules you will not be reimbursed.**

**2nd**…This is the procedure you must follow in order to get approval and receive funding for **lunch meetings** (this does not include SG funding for other events. "SG Funding" refers to a specific event/project your student group had spoken to us that was included in our annual budget).

1. You must submit a Fast Track Lunch meeting request which is on the MCC website

2. Once you submit this form you must receive approval from either MCC Treasurer (Zohair) or MCC President (Brad Collins/Justin Dourado) BEFORE you can submit an SAR. We will aim to inform you within **48 hours** but we are all busy so if you don't hear back then email us and remind us. Be sure to keep this 48 hour margin in mind with the **10 business day** requirement for SAR submission.

3. If you receive approval then you will submit an SAR (Student Activity Request), again at least 2 weeks before your event. Again, nothing can be purchased till the STUDENT BODY TREASURER approves it (Student Body Treasurer is different from the MCC Treasurer). Detailed instructions on SAR submission is found below in this guide.

4. **Now the really important part!**

   o  Title should be "MCC –Lunch Meeting on [ONE WORD SUBJECT]"

   o  The budgeted project number for **ALL** lunch meetings will be **99**

   o  WHOEVER IS PURCHASING THE FOOD IS THE **VENDOR**! The vendor is basically the person who the check is going to be written to. (Remember, these are done in reimbursements).

   o  When you get to add a new item a lunch meeting will always be **LINE 13**! If you choose line 66 (Food), which I know you'll be tempted to, your SAR will be denied and you will have to submit again.

   o  All of the other options for line items you will **NEVER** use unless you receive funding from Dr. Fantone's office or are included in the SG budget.

   o  When you put in the **description** you MUST include: Expected attendance, time, and location of event! If you don't I will deny it. To make it simple, **copy/paste/edit this**: Lunch meeting on [Subject] with [Dr. ___] on [date] at [time] in [event location]. Expected attendance is [#] people. Funds will be used to purchase [state food to be ordered]. ***LEAVE OUT MENTION OF SPECIFIC INTEREST GROUP NAME.**

   o  MCC will pay $3/person in attendance. And we allocate a max $150 per lunch meeting. Your requested amount should be based on your expected attendance. If your event has limited space, be honest in requests.

   o  You will then review and verify this request and submit. I will get an email that it was submitted so you do not need to tell me you submitted it.

5. You will receive notifications as the status of the SAR changes. Again only when it says APPROVED BY STUDENT BODY TREASURER can YOU purchase anything

6. Once you get that notification go buy the food you want and have a GREAT lunch meeting

**3rd**… You had your lunch meeting and you want to get paid… In order to get reimbursed you must take an itemized receipt (aka it shows what you bought) to SG Finance on the 3rd floor of the fancy new part of the Reitz union **WITHIN 30 DAYS OF THE EVENT.** The receipt must show proof of purchase and have a date (remember, must be later than when it was approved). They will get everything squared away and the checks are usually mailed within about 2 weeks or so.

**Specifically for students on heavy rotations/in Jax**: IF you cannot turn in your receipts up the hill on main campus in person, you *may* email SG Finance with copy of the receipts and the SAR# in subject line. Make sure on all correspondence with the

office you include **the SAR number** and the **reason** you are e-mailing your receipts. Be cordial in your email.

**4th**… Once you had your lunch meeting upload a picture and description to our [activity report form](#) so we can tell the alumni board where their money is going (this is why we list at Line 13 – Outside Revenue. The wonderful alumni board funds our lunch meetings).

# SAR Submission Walkthrough

A SAR (Student Activity Request) is a request to use funding allocated to your organization. For the most part, you may not purchase goods or book travels until your SAR has been approved by the MCC and Student Government Finance.

**1**) To submit an SAR, access the docutraq website: http://www.docutraq.sg.ufl.edu/
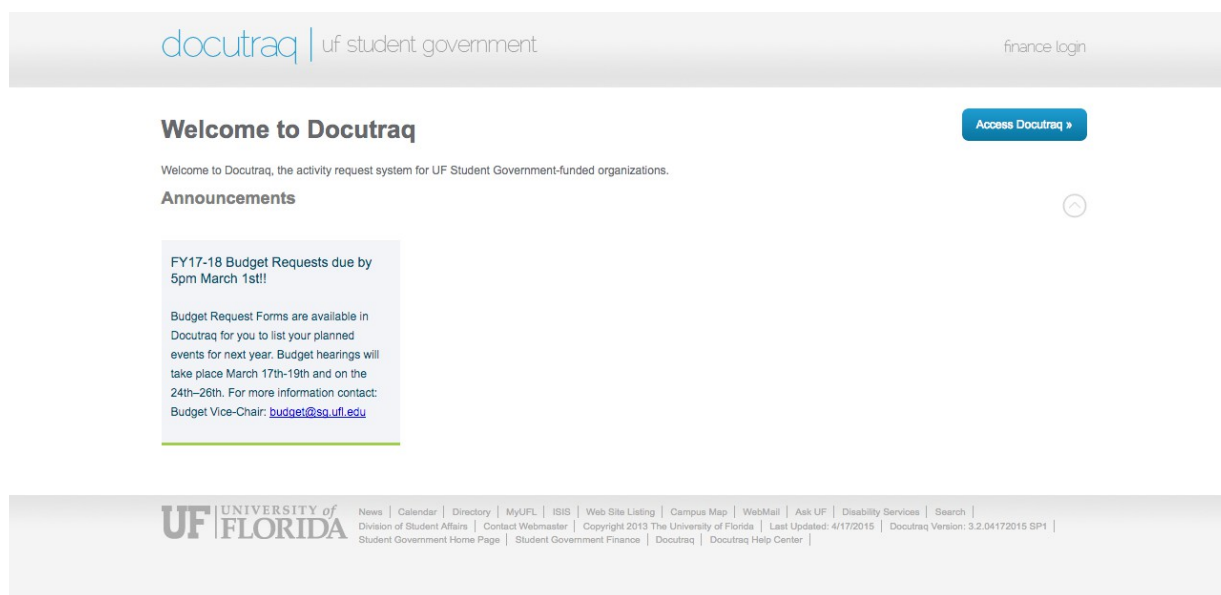


**2**) Once you reach the login page, select "MCC ( Medical College Council)" from the dropdown menu and enter the password "MCCGEN2012"

- Organization: MCC (Medical College Council)

- Password: MCCGEN2012

**3**) At the dashboard page, select "Create New SAR"



**4**) You will be asked whether you want to fill out an SAR for Goods and Services (your projects and events) or Travel. In this example we will be requesting Goods and Services.

**Logged Into: MCC** | Dashboard | View SARs | Your Budget | My Approvals | Log Out

**Create a New SAR**

**1. Select a Request Type**

2. Enter the Basic Info

3. Select a Vendor

4. Enter Your Items

5. Review Your Request

6. Verifying Your Request

7. Finish the SAR

## Select a Type of SAR

The decision at this point is whether you are creating a Student Activity Request (SAR) to buy goods and services or whether you want to create a TAR (TAR).

Anything that is not related to travel where you leave the city of Gainesville and UF property is procured under the "Goods and Services" section of the Docutraq system.

**Goods and Services**

**Travel**

\*\*Please take note of the deadline! MCC has no control over the Student Body Treasurer/Finance Manager's approval if the deadlines are not met.

**5)** You will be asked to enter contact information as well as a project or Travel number (see below for information about project/travel numbers). Lunch meetings, your title should be MCC –Lunch Meeting on [ONE WORD SUBJECT]." In this example, the FUN interest group wants to have a lunch meeting. But don't say FUN IG is having an event. Just say MCC Lunch Meeting on Success.



**Project/Travel Numbers**

- Alumni Funds – If you are using alumni money, use number 99 (**LUNCH MEETINGS**)
- If you are using money granted to your organization by Dr. Fantone's office (will be marked as "other" on MCC budgets webpage), use number 99
- SG Funds – If you are using money from your SG budget (i.e. your group previously discussed with MCC having a specific project/event to be included in our annual budget request), select the project/travel number specified on your organization's SG budget.

## PROJECTS, PROGRAMS, AND SERVICES

| | | Priority |
|---|---|---|
| Project Number | 1 | 1 |
| Title of activity | American Medical Association- Medical Student Section | |

**Purpose of activity**

To impact community-wide and tation-wide healthcare policy through Advocacy, Legislation, Community Service, and Leadership, and to raise awareness of medical issues.

**List the benefits to the State, the University and/or your organization**

By going to regional and national conferences where we have established a strong role of leadership, by participating in community service events (such as the HAMSA health fairs and conference community service projects), by going to state and national lobby days to speak to our legislators, and by holding lectures relating to AMA issues to increase general awareness.

**Locale of Project**    Gainesville, Fl

| Description: | Amount |
|---|---|
| | |
| | |

Other sources of funding and dollar amounts:

*REQUIRED: On a separate sheet, attach a detailed description of project.*
*Include copies of all pertinent flyers, agreements, etc.*

### NEW REQUEST TOTAL

| | | |
|---|---|---|
| Programs | | Expected Attendance: |
| Advertising | $946.00 | 100 |
| Supplies | | Previous Years Attendance: |
| Copies | ($0.40) | 100 |
| Awards | | |
| Off Campus Facilities | | |

**6)** You will then be asked to select a vendor. SARs are almost always paid via reimbursement. Someone in your organization will pay for the goods and will be reimbursed by the university later on. The vendor will be that person. So for lunch meetings, this would be YOU. If that person has been a vendor before, you can search for them in the system and select them.
In this example, **I am** going to go somewhere and purchase and pick up the food for a lunch meeting. So **I am the vendor to be repaid.**



Since this is my first time doing this, I will need to "+Add New Vendor"

If you are fancy and cater from Classic Fare Catering, then **they** will be the vendor. If you don't know what this is, then you are most probably not getting it catered from them and do not need to worry about this….so put **your** information as vendor.

For those that **do** choose to be fancy and cater, you will need to set it up with them. In these cases, since they are the vendor, they will need to be paid. So you enter their information. What happens is they will ask you for your SAR number, and that's it. They take care of the receipts, etc. Granted, **you need to have your SAR approved before the purchase is done.**

**Vendor Information**

| | |
|---|---|
| Name | Classic Fare Catering |
| Address | 120 Reizt Union |
| City | Gainesville |
| State | FL |
| Zip | 32610 |
| Phone | (352) 392-3463 |
| Email | |

docutraq | uf student government                                    finance login

| Logged Into: MCC | Dashboard | View SARs | Your Budget | My Approvals | Log Out |

**Create a New SAR**

1. Select a Request Type
2. Enter the Basic Info
3. **Select a Vendor**
4. Enter Your Items
5. Review Your Request
6. Verifying Your Request
7. Finish the SAR

## Select a Vendor

Search For: chick    [Search]   + Add New Vendor

◉ Name  ○ Vendor ID  ○ City  ○ Email

| Name | City | State | Email | |
|---|---|---|---|---|
| Chick Fil A | Gainesville | FL | | Select |
| Chick Fil A | Gainesville | FL | | Select |
| Chick Fil A | Gainesville | FL | | Select |
| Chick Fil A (Through Classic Fare) | Gainesville | FL | | Select |
| Chick-fil-a | Gainesville | FL | http://www.chick-fil-a.com/Connect/Contact-Us-CARES | Select |
| Chick-fil-a | Gainesville | FL | | Select |
| Chick-Fil-A | Gainesville | FL | | Select |

[Previous] [Next]

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Student Government Home Page | Student Government Finance | Docutraq | Docutraq Help Center |

**7**) You will be prompted to start adding items to your SAR



**8**) You will need to first specify which part of the budget you will be drawing money from (see below for more information). For lunch meetings, we pick LINE 13.

# Budget Lines

- If you are using money granted to your organization by Dr. Fantone's office (will be marked as "other" on MCC budgets webpage), select the relevant line number. For example, Equal Access will select "156 – Equal Access (OSRV)".
- Alumni Funds – If you are using alumni money, select "13 – Outside Revenue (OSRV)" **(LUNCH MEETINGS)**
- SG Funds – If you are using money from your SG Budget, select the relevant line item specified by your budget

\*DO NOT select "66 – Food" for lunch meetings. Your SAR will be denied. Select 13. Only select 66 if this is an event previously budgeted for.



(Budget Lines (cont) – for non-lunch meeting submissions)

| Programs | | Expected Attendance: | |
|---|---|---|---|
| Advertising | $946.00 | | 100 |
| Supplies | | Previous Years Attendance: | |
| Copies | ($0.40) | | 100 |
| Awards | | | |
| Off Campus Facilities | | | |
| Food | $400.00 | | |

**TOTAL** $1,345.60

**Project Number 1**

| Description | No. of Items | Cost per Item | NEW REQUEST TOTAL |
|---|---|---|---|
| **PROGRAMS Line 02** | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| **ADVERTISING Line 06** | | | |
| White Coat Magazine | 260 | $3.64 | $946.40 |
| Round to whole dollars | 1 | -$0.40 | -$0.40 |
| | | | |
| **SUPPLIES Line 05** | | | |
| | | | |
| | | | |
| | | | |
| **COPIES Line 57** | | | |
| Round to whole dollars | 1 | -$0.40 | -$0.40 |
| | | | |
| **AWARDS Line 16** | | | |
| | | | |
| | | | |
| **OFF CAMPUS FACILITIES Line 43** | | | |
| | | | |
| | | | |
| **FOOD Line 66** | | | |
| | 4 | $100.00 | $400.00 |
| | | | |

**9**) You will then be asked to enter the details of the item you are purchasing. Include expected attendance, time, and location! If you don't it will be denied.

LUNC MEETING- make it simple, **copy/paste/edit this**: "Lunch meeting on [Subject] with [Dr. ___] on [date] at [time] in [event location]. Expected attendance is [#] people. <u>Funds will be used to purchase [state the food to be purchased]</u>"

*Don't mention the Interest group.

MCC will pay $3/person in attendance. And we allocate a max $150 per lunch meeting (for 50 students). Your requested amount should be based on your expected attendance.

***If your event has a limit to how many students can attend, your funding request amount should reflect this. Be honest.

Here for lunch meetings, **Quantity** is just 1, and the **Price** is how much you are requesting.

==**the description below is incorrect – the user should state funds will be used to purchase chikfila sandwhichs (not just "food")==

**10**) When you are done adding items, move on to the next page. You will see a summary of your SAR and a "Submit" button. Click Submit.



**11**) Your screen will process then complete.

After you are done, you will need to wait for it to say APPROVED BY STUDENT BODY TREASURER. (this is different from MCC Treasurer). Do NOT purchase anything before it is approved, otherwise you will not be reimbursed.

# Once you've had your event: … In order to get reimbursed you must take an itemized receipt (aka it shows what you bought) to SG Finance on the 3rd floor of the fancy new part of the Reitz union **WITHIN 30 DAYS OF THE EVENT.** The receipt must show proof of purchase and have a date (remember, must be later than when it was approved). They will get everything squared away and the checks are usually mailed within about 2 weeks or so.

**Specifically for <u>students on heavy rotations/in Jax</u>: IF you cannot turn in your receipts up the hill on main campus in person, you *may* email SG Finance with copy of the receipts and the SAR# in subject line. Make sure on all correspondence with the office you include **the SAR number** and the **reason** you are e-mailing your receipts. Be cordial in your email.

# Once you had your lunch meeting/event, upload a picture and description to our <u>activity report form</u> so we can tell the alumni board where their money is going (this is why we list at Line 13 – Outside Revenue. The wonderful alumni board funds our lunch meetings).

*if anything is unclear from this guide, or if there is a specific aspect you would like to have included, *please* let us know so that we can clarify it in an updated guide