Advisor Workshop

Advisor Roles & Responsibilities

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Welcome!

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Overview

- What is an advisor?
- Roles & responsibilities overview
- Student organization policies & procedures
  - Student org policies
  - Engage
- Finances
  - SAFAC v. Non-SAFAC
  - Workday
- Resources
What is an advisor?

Advisors are to serve primarily as resources and consultants to the student organization, providing them the room they need to succeed and also to fail. By sharing both knowledge about the university and personal experiences, the advisor can assist the organization in the conduct of its activities. In addition, valuable, mutually rewarding, co-curricular relationships between students and advisors are fostered.
What do you do as an advisor?
To discuss organizational goals and objectives.

**Should work** with student organizations but **not dictate** the group’s programs or activities.

Should be **honest** in offering suggestions, **considerations or ideas**, and discussing possible consequences.

Provides a **source of continuity** within the organization and is familiar with the organization’s history.

Is familiar with **university policies and procedures** and helps the organization comply with them.

Should be aware of the **general and specific financial condition** of the organization, and encourage thorough record keeping.

Helps **train new officers** and helps students develop their **leadership skills**.

Should be prepared to **deal with major problems or emergencies** within the organization.

**Monitors group functioning** and encourages members to fully participate and maintain balanced academic activities and co-curricular commitments.
Main responsibilities

1. Maintain the organization’s budget
2. Complete the re-registration process
3. Facilitate organization elections
Student Org Policies

- Student Org benefits
- Engage
- SAFAC
- Performers & Contracts
- Re-registration
- Advisors
- Student Rights & Responsibilities, COSO Guidelines, SAFAC Guidelines, SCC Policies
Engage

Re-registration, elections, and budgets, oh my!

JOIN THE CLUB
SAFAC Account:

- Funds approved by the Student Activity Fee Allocation Committee (SAFAC)
  - Budget is submitted to SAFAC for review
  - SAFAC reviews budget and approves/denies line items
  - SAFAC notifies organization of their decision via email
  - SAFAC uploads the budget to the organization’s Engage portal
  - Funds are transferred to the organization’s SAFAC account
SAFAC vs. Non-SAFAC account

SAFAC guidelines must be followed when spending

Example:

- **Guideline**: SAFAC funds up to $5 per t-shirt
- Approved budget: $150 for 30 t-shirts ($5 per shirt)
- Org purchased 25 shirts for a total of $150 ($6 per shirt)
- Org will only be reimbursed based on guidelines even though the total dollar amount is the same
  - $5 per shirt x 25 shirts bought = reimbursed $125
  - Any extra funds will be returned to SAFAC at the end of the academic year
Finances

SAFAC vs. Non-SAFAC account

Non-SAFAC Account:

- Dues, fundraising, purchases not approved by SAFAC, etc.
- Up to the discretion of the org to decide how to spend money

Sponsorships/Grants:

- **Late Night Programming Grant**
  - Event takes place on a Thursday, Friday, or Saturday between 8PM and 1AM
  - 2 requests per academic semester
  - Found on Engage under forms

- **SASO Co-Sponsorship**
  - Up to 2 events per academic year
  - Found on Engage under forms
Purchasing Card & Travel Card

- www.miami.edu/corporatecard
- Corporate Cards Office at Gables One Tower Suite 750
- (305) 284-3570

Venmo, Airbnb, third-party applications

- Student organizations are not permitted to use Venmo or any similar third-party applications/websites to collect money.
- Students may not deposit organization funds into their personal bank accounts at any time. If money collected is being used to pay for approved organization activities, the money should be deposited into the organization’s account and then withdrawn in accordance with the University of Miami’s purchasing policies.
- Student organizations are not permitted to use Airbnbs or any similar third-party applications/websites to book rooms for University of Miami trips.

Payment Matrix:
https://controller.miami.edu/_assets/pdf/documents/pym_matrix_by_pyrm_type.pdf
Finances

Account Balance

- You can find your organization’s Program IDs (account numbers) on their Engage portal or by searching the org’s name in the Workday search bar.
- The report we recommend to view your account balance is called: “FIN-ACC-Balance Forward/Balance Available by Worktag”
### Account Balance

#### Details

<table>
<thead>
<tr>
<th>Ledger Account</th>
<th>Revenue &amp; Spend Category</th>
<th>Budget</th>
<th>Actuals</th>
<th>Commitment</th>
<th>Obligations</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>8285:Telecommunications (Blank)</td>
<td>SC08851 - Monthly - Data Circuits</td>
<td>0.00</td>
<td>88.10</td>
<td>0.00</td>
<td>0.00</td>
<td>(38.10)</td>
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<tr>
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<td>87.40</td>
<td>0.00</td>
<td>0.00</td>
<td>(47.40)</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>0.00</td>
<td>85.50</td>
<td>0.00</td>
<td>0.00</td>
<td>(85.50)</td>
</tr>
</tbody>
</table>

- **Balance Forward - Prior Fiscal Year End**: 0.00
- **+Revenues**: 0.00
- **+Expenses**: 85.50
- **+Commitments**: 0.00
- **+Obligations**: 0.00
- **Balance Available - For Selected Period**: 85.50
Finances

• Review all Workday transactions in a timely manner

• Scroll down to the bottom of the Workday item to review any comments before approving/denying/send back

• Update your Workday notifications
  ○ Click on the cloud icon in the top right corner
  ○ My Account → Change Preferences

• Workday trainings are available on Ulearn and the link below:
  https://workday-hr.it.miami.edu/training/workday-finance/training-catalog/index.html

• Program Manager:
  ○ Approves business processes and has access to reports about the Program in Workday.

• Cost Center Manager:
  ○ Ability to initiate as well as approve certain HCM (Human Capital Management) and Finance business processes for workers in their Cost Center(s) or Cost Center Hierarchy.

• Program Reviewer:
  ○ View financial information about assigned program(s)

• Department Procurement Data Entry Specialist:
  ○ Initiate P-Card transaction submissions and purchase requisitions on behalf of other employees in an assigned organization
  ○ Initiate a check request (formerly eCheck)
Finances

Student Reimbursements

Communication is key!

- Students **DO NOT** have access to view their reimbursement in Workday
  - They do not get notified if it is approved/denied/sent back
- Communicate with the student if they need to provide you with additional documentation/information to upload on their behalf
- If the reimbursement is denied, please contact the student
Before signing off on a SAFAC budget, you might want to keep these things in mind:

- Does what they’re requesting align with the org’s guiding principles?
- Review the items or travel being requested
- Does the org have storage space on campus for those items?
- Are you aware of the events mentioned in their budget?

SAFAC review process:

- SAFAC will review all budget submissions during their Wednesday meetings
- The budgets are approved by the Vice President for Student Affairs and will be posted to an Org’s Engage portal by the following Wednesday. An Org has until that Friday at 8AM to appeal
- Funds are deposited into the organization’s account 7–10 days after the presentation to SAFAC.
Resources

Advisor Workshops

• Workday Finances – Tuesday, October 1
  ○ 12PM–1PM
  ○ Shalala Student Center Iron Arrow

• Purchasing & Supply Chain Meet & Greet – Monday, October 28
  ○ 12PM–1PM
  ○ Shalala Student Center Iron Arrow

• www.miami.edu/saso
• www.miami.edu/safac
• Student Organization Handbook
• Advisor Handbook
  ○ Workday
• 1 on 1 meetings
Help us help U.

What can we do to help you?
Questions?