



Western
University
OF HEALTH SCIENCES

Student Club/SGA Treasurer and Fundraising Training

Presented by: Student Life & Student Leadership*

*previously University Student Affairs

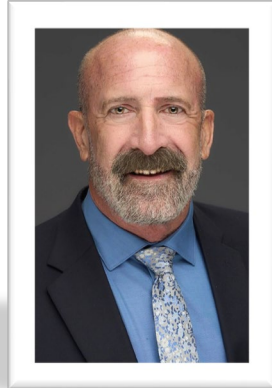
Agenda

- **SLL & Executive SGA**
- **Part 1: Treasurer Responsibilities**
 - Account Information
 - Forms & Deposits
 - Reimbursements and Payments
 - Class Votes
- **Part 2: Fundraising Training**
 - Policy Changes
 - How to Raise Funds
 - Tax ID#s
- **Part 3: Event Advertising**
 - Monday Mail
 - Flyers & e-boards
- **Part 4: Reserving Space and Food Permit**

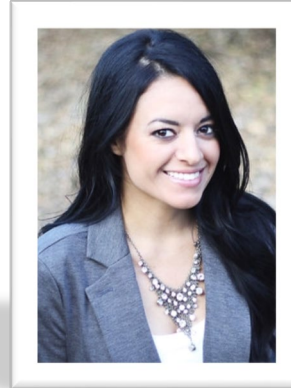
There will be Zoom knowledge checks at the end of each part – you will be required to respond!

Student Life & Student Leadership*

Schedule an appointment with our Team via Bookings!



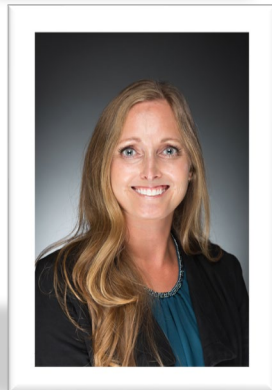
Dr. Tim Wood,
Vice Provost,
Faculty Affairs and
Student Success



Alana Nuno,
Executive Assistant



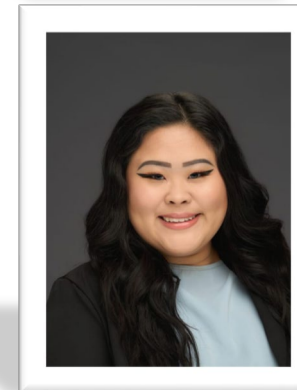
Christy Ho,
Associate Vice Provost,
Student Success &
Student Life



Jessica Beckman,
Director



Melody Ramos,
Coordinator



Sharen Moniqca,
Coordinator

On-campus five days a week in the Student Services Center (SSC) 8:00 a.m. – 5:00 p.m.

Closed 1:00 – 2:00 p.m. for lunch

**Previously University Student Affairs*

westernu.edu

WesternU Oregon COMP-Northwest & CHS-Northwest



**Dr. Mirabelle Fernandes
Paul**
VP, University Student
Affairs, WesternU Oregon

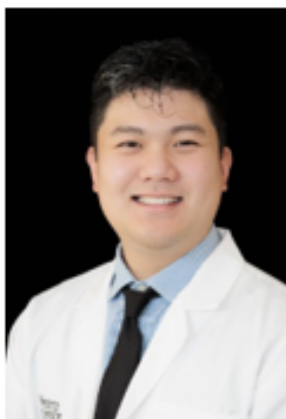


Executive SGA Officers | April 1, 2025-March 31, 2026



Gregory Bai
DMD 2026

**Executive SGA
President**



Joowan Son
DPM 2028

**Executive SGA
Vice President**



Parisa Mirjalili
DO 2028
(Northwest)

**Executive SGA
Vice President
WesternU Oregon**



Sukhjinder Momi
DO 2028

**Executive SGA
Treasurer**



Kenny Ngo
MS '24
DO 2028

**Executive SGA
Secretary**



Liliana Martinez
MS '24
OD 2028

**Executive SGA
Club Coordinator**



Andrew Tice
DO 2028
(Northwest)

**Executive SGA
Club Coordinator
WesternU Oregon**

Part 1: Treasurer Responsibilities

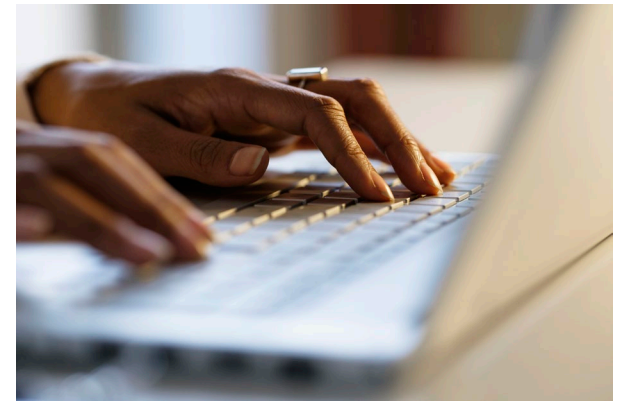
Training provided by University Student Affairs



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How To: Account Information

- Each club/class has an account with University Treasury.
 - *Off campus accounts are prohibited.*
- View account balance on **my.westernu.edu**
- Only Treasurers have access
 - Watch for an e-mail with instructions
- Student Affairs
 - Pomona – Student Life & Student Leadership
studentlife@westernu.edu
 - Lebanon –
studentaffairsOR@westernu.edu



Viewing Your FUND

https://us1.teamdynamix.com/tdapp/form/ClubFinancialReport?_cust=westernu&i=beca7e1c-99c5-4d37-a94b-765b50751c9e

Western University
OF HEALTH SCIENCES

Club/Class Financial Report

Understanding your Club/Class Account:

Each Club/Class is assigned two account types:

- **70899 – Clearing:** This account is used for incoming deposits such as fundraisers, dues, or donations going into the account.
- **70850 – Miscellaneous:** This account is used for expenses, transfers, and reimbursements related to your club/class activities taken out of your account.

Important Note on Transactions:

Entries enclosed in **parentheses ()** indicate money being deposited into your account. Always refer to the **"Available Balance"** for the most accurate representation of your spendable funds. However, this amount **does not** include pending transactions that have not yet cleared.

Contact studentlife@westernu.edu with any questions.

Select "26" ⇒ Fiscal Year: 26

Type or look for Fund Number ⇒ Fund: Select Fund

- 3001 - SGA Student Government Assoc
- 3002 - SAOASM
- 3003 - Student American Vet Med Assc-SAVMA
- 30030 - Josh Project by SCAVMA
- 3004 - Lifestyle Medicine Interest Group
- 3006 - Student Amer Acad Osteo - SAAO

The "FUND" number is unique to each club.

nu.edu

How To: Read Your Statement

Fiscal Year:

Fund: **Sample Account** **Download**

Balance ⇨

Available Balance: (\$14,088.80)

Deposits ⇨

Account: 70899 - Clearing

Year-to-Date: (\$16,893.82)

Doc. #	Transaction Date	Activity Date	Description	Fund	Account	Amount
F0085679	07/01/2025	08/19/2025	Opening Bal FY25/Rollover FY26	3108	70899	(\$14,903.97)
F0085406	08/04/2025	08/04/2025	Spring Fundraising Event	3108	70899	(\$196.00)
F0085406	08/04/2025	08/04/2025	April Membership Appreciation	3108	70899	(\$9.00)
F0086048	09/18/2025	09/22/2025	Fall Club Week 2025 Incentive	3108	70899	(\$50.00)
F0087235					70899	(\$1,734.85)

Sample Account

Expenses ⇨

Account: 70850 - Miscellaneous

Year-to-Date: \$2,805.02

Doc. #	Transaction Date	Activity Date	Description	Fund	Account	Amount
10733716	10/09/2025	10/10/2025	GHHG Rio Rancho, LLC	3108	70850	\$2,523.66

Clearing (70899) = Deposits

Miscellaneous(70850) = Expenses

How to: Find Your Forms

Westernu.edu/students



westernu.edu/students/forms/

University Student Affairs

✕ EXPLORE UNIVERSITY STUDENT AFFAIRS

Welcome

Services &
Resources

Housing
Information

Fitness
Memberships

Contact Us

Clubs

Discounts

Student
Government

Forms

Frequently Used FORMS

See below for some links to our most frequently used forms.

Monday Mail →

Event Reservation Form - California →

Event Reservation Form - Oregon →

Student Leader handbook →

Reimbursement Form →

Deposit Form →

Health Screening Approval Form →

How To: Deposit Money

Deposit Form Found on the Forms Page



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OF HEALTH SCIENCES

Club/Class Deposit Form

All deposits are made at the Bursars Office.

Date: WesternU E-mail Address:

Your Name:

Club or Class Name:

Total number of checks for deposit – DO NOT INCLUDE AMOUNT

Total amount of cash for deposit – NO CASH FOR LEBANON

Club/Class Fund#	Org	Acct.	Program	Amount of Checks/Cash	Description
1234	4099	70899	40	\$200	Cash, boba fundraiser
Notes:				\$100	Check, donation
<ul style="list-style-type: none"> You do not have to list each check individually. Put a total and a brief description. (e.g. Membership-Dues) List total amount of cash and checks separately For fundraisers (Bake sale, etc.) include the event date 				\$100	Check, donation
				\$	Total Deposits \$400

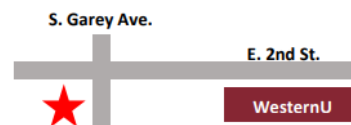
Deposits in Person:

Anderson Tower – 4th Floor
100 W. Second St. Pomona, CA 91766

2665 S. Santiam Hwy. Lebanon, OR 97355
Attn: Brittany Goe

Contact Information:

BursarsOffice@westernu.edu
909-469-5403



Deposits by Mail:

WesternU Attn: Bursars Office
309 E. 2nd Street
Pomona, CA 91766

Only mail checks/money orders (no cash)

Make check payable to: WesternU or Western University of Health Sciences. Add club/class name to memo. *Checks that are written to anything EXCEPT WesternU or Western University of Health Sciences will not be accepted. Please be sure to write the University name in the "To" section of the check.*

Request a receipt for your records.

Deposits can be made either by sending CHECKS (no CASH) through the mail. Deposits can be made in person at Anderson Tower during business hours.

If you are expecting funds as a wire transfer (from a donor or national organization), please notify Bursar@westernu.edu and cc our office via email (studentlife@westernu.edu or studentaffairsor@westernu.edu).

Reimbursement Form

Found on the Forms Page

Payer and Payee Information



Event Information




Detailed Expenses and Total to Be Reimbursed



No alcohol purchases will be reimbursed

Signatures and Account Balance



Club/SGA Account Payment Form			
		<ul style="list-style-type: none"> ■ Merge this document and all itemized receipts/documents into one .pdf ■ Attach design approval e-mail if using a personalized logo (t-shirts, mugs, etc.) ■ Reimbursement requests should be submitted within 10 days of the purchase; travel reimbursements within 30 days of travel or by June 15th ■ Travel form for all overnight student travelers: https://prod.westernu.edu/studenttravelform/ 	
Pay From:	Club/Class Name	Payer Fund#	
Recipient is a:	<input type="checkbox"/> Student (Direct Deposit, Student ID@ Required)		<input type="checkbox"/> Third-Party/Vendor (Mail payment)
	<input type="checkbox"/> University Account (Transfer) – Provide FUND/FOAPAL for transfer here:		
Payee Information:	Name/Business:		
	Address:		
	City:	State:	Zip:
	Telephone:	Student ID# @	
Event Information:	Event Name:	Date:	
	Guest Speaker Name (if applicable):		
Description of Purchase(s):	Item(s):	Amount Spent:	
Reminders: Must provide itemized receipts. Alcohol is not reimbursable.		Total Spent:	
		Total to be reimbursed (if less than total spent):	
Signatures:	I hereby certify that the above goods, services, or expenses have been received, rendered, or incurred to my satisfaction. Invoice(s) and/or itemized original receipt(s) are attached.		
	Club/Class President/Class Rep	Print Name	Date
	Club/Class Treasurer/Class Rep	Print Name	Date
	Treasurer:	→To ensure adequate funds, provide current account balance: \$	
<small>Treasurers can view account balance at https://westernu.edu/students on the 'Student Services' card -> 'View Clubs/Class Financial Report'</small>			
Submit:	Once complete, combine this document and all receipts/invoices/supporting documents into one .pdf. Email to studentaffairs@westernu.edu (California) or studentaffairsor@westernu.edu (Oregon) with the subject: Student Reimbursement: NAME, CLUB/CLASS, PURPOSE FOR REIMBURSEMENT.		

How To: Submit Emailed Reimbursements

1. Requestor completes the reimbursement form and saves the document as a SINGLE PDF.
 - Club Acronym-Payee-Submission Date (E.g., ABCD-Susie Student-8-25-24)
2. Requestor sends document to Club/Class President and Treasurer for signature.
 - If Club/Class President and Treasurer do not have the capability to sign electronically, they can email the requestor with the following: “As President or Treasurer of (club/class), I approve the reimbursement request for \$XX to (student).” The Requestor can then save the email(s) and attach it to their reimbursement PDF in one file (watch how to combine PDF files into one).
3. Once the form is complete, the reimbursement form and all receipts can be emailed to University Student Affairs (studentlife@westernu.edu or studentaffairsor@westernu.edu) with the subject: Student Reimbursement: NAME, CLUB/CLASS, PURPOSE FOR REIMBURSEMENT.

A few important details to note:

Please make sure all files are CLEAR. Blurry photos of receipts and documents will be returned.

On the receipts, please write, “SUBMITTED ON (DATE)” so that the receipt can only be submitted once.

CASH PAYMENTS CANNOT BE REIMBURSED WITHOUT PROOF OF PURCHASE OR AN INVOICE SHOWING IT WAS PAID

Paying a Vendor VS Reimbursement

- **Paying a Vendor Directly**
 - Complete the Student Reimbursement Form
 - Attach an itemized invoice or contract that indicates the amount that will need to be paid and by when
 - A check will be cut directly to the vendor
 - **New vendors and speakers need to submit a W9 Form**
 - This includes reimbursements paid to anyone that is NOT a student or employee of the University.
- **Pay Out Of Pocket & Be Reimbursed**
 - Use your personal credit card or checking account to pay
 - Obtain an **itemized receipt**
 - Complete Student Reimbursement Form & attach receipts, and any other supporting documentation
 - The amount will be direct deposited to your bank account

How To: Payments

Reimbursement checks & direct deposits take 1-4 weeks to process so plan accordingly!

- Checks
 - Cut on Thursday of each week. Checks will be available by 3pm on Thursday and the following Friday morning.
 - Email will be sent to you when ready for pick up at University Student Affairs (Pomona) or COMP-Northwest Student Affairs (Lebanon)
 - Bring your student ID to pick up
- Direct Deposit
 - Electronic Fund Transfer email
 - If you need to confirm which account you have with the University, reach out to Financial Aid
 - The payee will receive an email from noreply@westernu.edu once the funds have entered your account.

How To: Delay Your Money

- Missing Receipts
- Receipt missing details of purchase
 - Not itemized
- Missing Logo approval e-mail
- Form not signed
- Missing Student Travel Notification form
- Student signed the contract with vendor
- Missing a Class Vote (only for SGA/Class)

How To: Reimburse For Travel

- Pre-Travel: Fill out “Student Travel Notification Form”
 - 2 weeks prior to departure
 - Good academic standing
 - Required to get reimbursed
- During Travel: Keep ALL original itemized receipts
- Post-Travel: Submit Student Reimbursement Form
 - Mileage (Federal rate)
 - Food: \$12/breakfast \$18/lunch \$36/dinner

How To: Sign Contracts

- **Just kidding...**Don't sign contracts.
- Your college administration is not allowed to sign contracts, but they can submit your agreement for review on your behalf!
- **For clubs:** Contact Christy Ho (hoc@westernu.edu) or Jessica Beckman (jbeckman@westernu.edu) to schedule a meeting to get your contract signed.
- The process can be LONG – at least 14 business days. Please build time into your planning to follow the proper channels!

How To: Sign Contracts

- Just kidding...Don't sign contracts.
- Your college administration is not allowed to sign contracts, but they can submit your agreement for review on your behalf!
- For clubs: Contact Christy Ho (cho@westernu.edu) or Jessica Beckman (jbeckman@westernu.edu) to schedule a meeting to get your contract signed
- The process can be LONG - at least 44 business days. Please build time into your planning to follow the proper channels!

Never sign a
contract or make
your own

How To: Invite Guests to Campus

- If you are inviting a guest to campus or virtual (e.g. Zoom) to **provide a service** (e.g., guest speakers) there is paperwork to complete, even if they are not getting paid.
- If you are reimbursing them for travel or paying a speaker fee there is **MORE** paperwork to complete.
- This does not apply to guests on campus that are attending an event (not providing a service) or WesternU Faculty.

Treasurer Reminders

- Do not comingle funds
 - If you are fundraising for a third party (e.g., Susan G. Komen), do not deposit those funds in your account.
- Deposit all funds into your University-provided account within 72 hours.
- Do not create off-campus bank accounts.
- At the end of your term, you are responsible for the health of your club/SGA fund by ensuring your account is balanced.
 - Club Officers are responsible for submitting Certificate of Organizational funds (COF) paperwork that states the fund is in good order.

Knowledge Check!



Please check Zoom
to complete the
knowledge check
for Part 1!

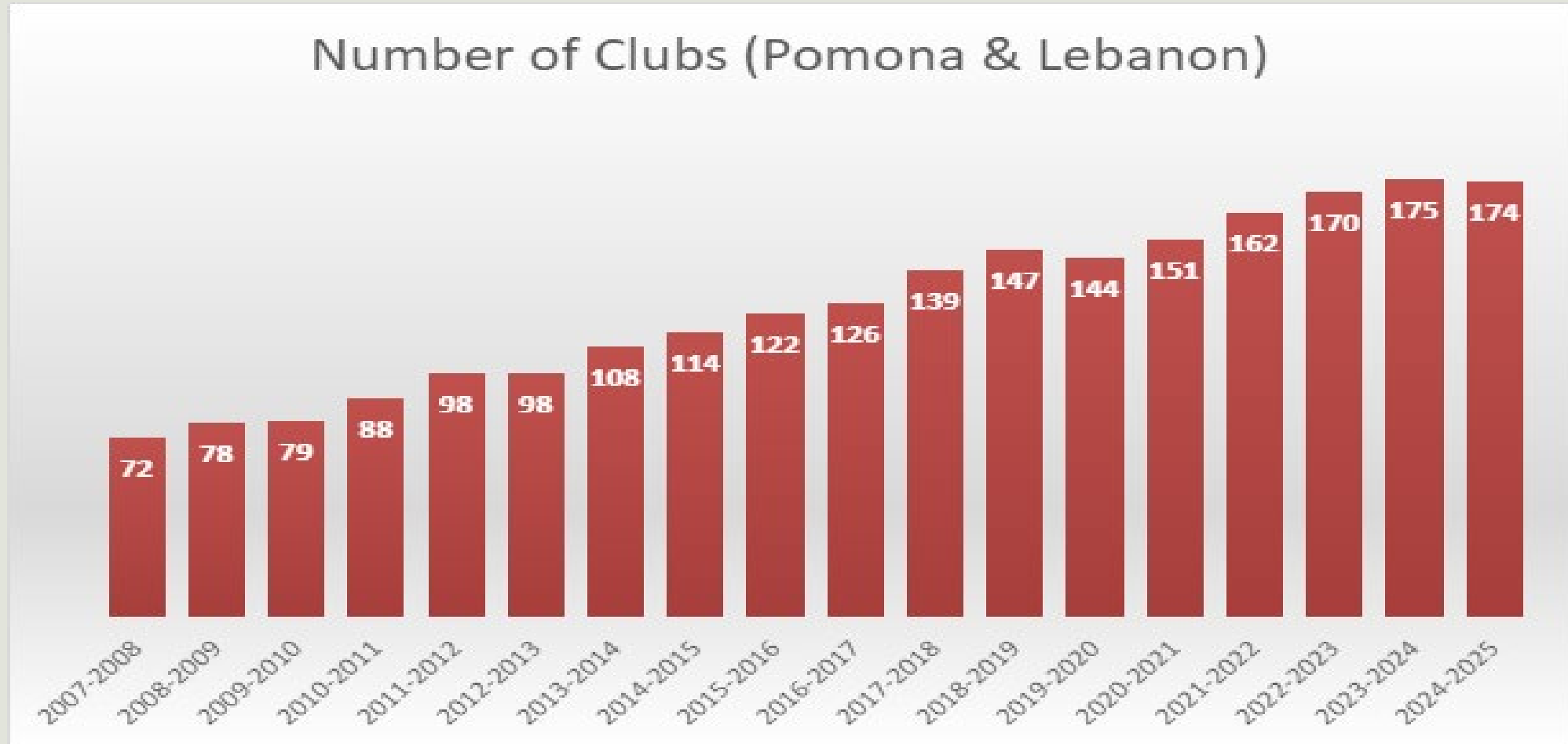
Part 2: Fundraising Training

Training provided by University Student Affairs



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WesternU Clubs



Policy Changes

Student Organization Fundraising Policy – Effective 7/31/2025

With approval from SLL students may:

- Collect food, clothing, or other donated items from the Campus Community that directly benefit the Student Organization.
- Purchase goods (e.g. baking supplies) to resell.

With approval from SLL and External Affairs students may:

- Conduct off-campus fundraising activities in partnership with local businesses (e.g. “restaurant takeovers”). Approval required at least 10 days prior.
- Solicit the Campus Community for outright gifts (e.g. Cash) that are NOT donor restricted.

Policy Changes

Student Organization Fundraising Policy – Effective 7/31/2025

Students may not:

- Solicit the Campus Community for Outright Gifts that are Donor Restricted.
- **Organize a raffle, game of chance, or gambling event** of any kind for the purpose of fundraising.
- Use third-party payment platforms (e.g. Venmo or GoFundMe) to collect **Outright Gifts** of any kind.
 - CashNet is preferred for accepting payment for transactions.
- Carry out any fundraising activities without the explicit written approval of SLL and, when required, External Affairs.
- Use the **University's federal tax ID number** for any purpose without prior written approval from the University's legal counsel, finance office, and External Affairs.
 - In general, this number is only provided via formal gift receipts when the University accepts and processes a tax-deductible donation.

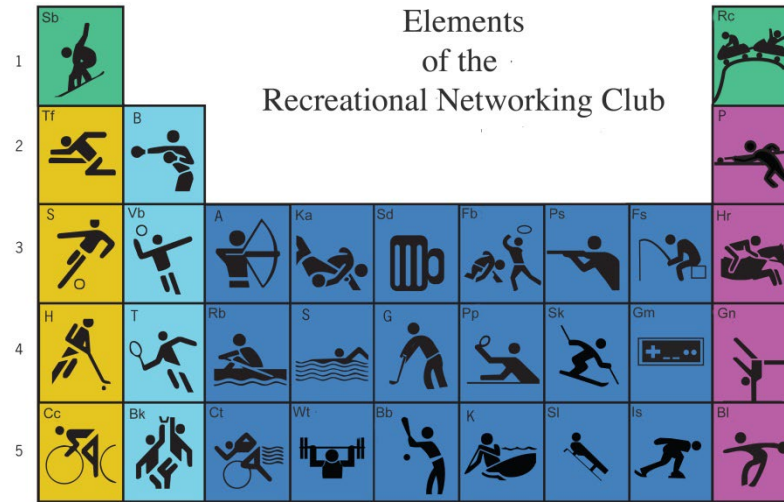
How to Raise Funds

Work smarter, not harder:

- **Clubs:** Consult the club annual report from 2025-2026 or
- **Class SGA:** talk to your upperclassmen/predecessors and Student Affairs Professionals for ideas
- **Most often, successful fundraisers are food & merchandise sales**

But be aware of new policy changes!

Fundraising Ideas - Merchandise



- Clothing
- Pens
- Water Bottles
- Lunch Bags
- Coffee Cups



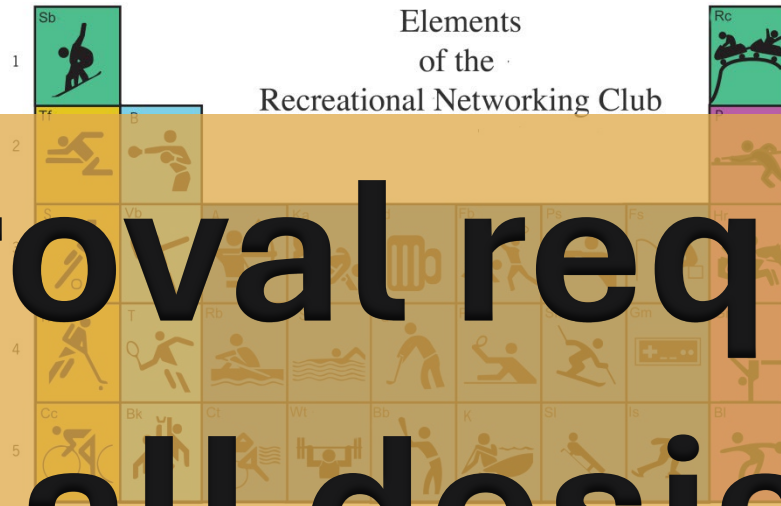
Partner with the Campus Store!

The Campus Store is an authorized retailer with many manufacturers. They may be able to get you a better deal! Email campusstore@westernu.edu for a quote on purchasing merchandise in bulk.



Fundraising Ideas - Merchandise

Approval required for all designs!



Clothing
Pens
Water Bottles
Light Bags
Coffee Cups

Partner with the Campus Store!

The Campus Store is an authorized retailer with many manufacturers. They may be able to get you a better deal! Email campusstore@westernu.edu for a quote on purchasing merchandise in bulk.



Branding Standards

- UNIVERSITY NAME

"**WesternU**" and "**Western University of Health Sciences**" are the **ONLY** acceptable usages of the University's name.

- UNIVERSITY COLORS

The University colors are **burgundy** and **white**.

- ACCENT COLORS

The University accent colors are **black**, **gold** and **grey**.

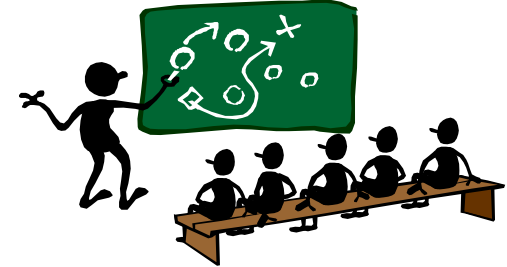
Resources:

<https://www.westernu.edu/publicaffairs/brand-guidelines/logo-guidelines/>

<http://webassets.westernu.edu/westernu-news/style-guide/style-guide.pdf>

Fundraising Strategies

- Get approval from SLL
 - Email studentlife@westernu.edu or studentaffairsOR@westernu.edu and include your College Student Affairs Professional
- Start fundraising on-campus first!
- Ask club and/or class members to support of your fundraiser event
- Approach local restaurants and businesses *(with approval from SLL and External Affairs)*
- Student Government Association *(requests for class banquets or class gifts not eligible)*



Use of a Tax ID#'s

- **Tax ID from WesternU – Not permitted**
 - University cannot provide any tax information to clubs/SGA. Any funds that are received that require a tax ID number must be sent directly to Advancement and cannot be used for club/SGA activities.
- **Tax ID from External Organization**
 - When raising money for an external organization you should request use of their tax ID number. Do not deposit these funds into class/club accounts!

Requesting Your Own Tax ID#

- **Tax ID for a WesternU Club/SGA – Not recommended**
 - Requires your personal SS#
 - Holds you personally accountable for filing of tax returns and other government documents.
 - Tax ID number not enough to receive donations
 - After you apply, you may incur significant cost to qualify your club as a “tax exempt organization” in order to legally receive tax-deductible donations.
 - No association with WesternU in name/address etc.

Knowledge Check!



Please check Zoom
to complete the
knowledge check
for Part 2!

Part 3: Advertising Your Event

Training provided by University Student Affairs



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Monday Mail, E-boards, Flyers & Localist

- Monday Mail is for campus-wide events/announcements. Be sure to submit your entry the Thursday before your event.
 - SGA Boards have the right to email individual classes for program-specific events. Please do not misuse your email account by emailing multiple distribution lists when Monday Mail should be used.
- E-Boards: When submitting your ad via Monday Mail you can opt to upload a flyer for the e-boards around campus.
 - Certain specs are required, and we can't post unless they are correct.
 - Specs are listed in the Monday Mail form.
- Flyers can be created for electronic distribution or print. All flyers must be approved.
- Localist is for campus-wide events, contact studentlife@westernu.edu to have your event added.

Monday Mail



Monday Mail @ WesternU

Student-led activities and fundraisers happening this week.

Ongoing Events



SC - American Association of Feline Practitioners
Foster Parents Needed!

Looking for a furry friend to keep you company as you study? Become a foster parent today!

Tuesday October 05, 2021



Cardiology Interest Group
CIG Event 10/5 - Dr. Keen

Join us for a talk on coronary artery disease by Dr. William Keen on 10/5 @5:30pm. Zoom ID: 995 3638 0738. SEE FLYER FOR DETAILS!



Global Health Club-Pomona
Reflect on Afghanistan

Join us on ZOOM for panel discussion REFLECTIONS ON AFGHANISTAN Oct 5 @ 5:30-6:30PM. Meeting ID: 920 1631 9659 Passcode: +93

LOOKING FOR YOUR PURR-FECT MATCH?

BECOME A FOSTER PARENT TODAY!

With Inland Valley Humane Society & S.P.C.A.,
H.O.P.E Rescue, and RescueWorks!

QUESTIONS? CONTACT OUR CLUB:

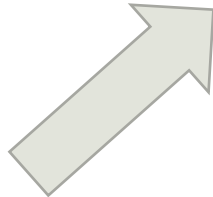
SC-American Association of Feline Medicine
scaafclub@westernu.edu



Flyer Requirements

- Students now have access to Canva Premium for super easy and beautiful flyer creation!
- Only use approved WesternU Logos (send to studentlife@westernu.edu for approval) – approval good for one year
- Use the University’s name properly (and in the correct font)
- Do you have permission to use an affiliate’s name/brand (e.g. Target)
- ALL flyers must be approved – send to studentlife@westernu.edu
- Don’t attach, embed the image in the e-mail.

Event Advertising Guide on [SLL Forms page](#).



WesternU Student-Led Events: Advertising Guide



PLANNING THE EVENT

- Start planning early!
- Follow procedures for making a [room reservation](#)
- When in doubt, refer to the [Student Leader Handbook](#)
- Email flyers and designs to studentaffairs@westernu.edu

ADVERTISING THE EVENT

All flyers must be approved and stamped by University Student Affairs (USA) prior to distribution (physically or digitally).

Flyers will be removed if they do not contain a USA stamp of approval.

Where to Advertise

MONDAY MAIL (RECOMMENDED)

- Get flyers approved, apply for electronic boards, and broadcast to the entire campus in [one form](#).
- All information must be submitted by Thursday at noon to be included in the next week’s Monday Mail.

ELECTRONIC BOARDS

- Broadcast event details campuswide via electronic boards!
- Submit event details and request E-Board approval via Monday Mail form!

EMAIL COMMUNICATION

Email to distribution lists specific to your College/Program!

- Reach out to your class officers for more information

BULLETIN BOARDS (PRINTED)

Permitted areas for physical flyers:

- Bulletin boards and inside classroom doors (See map attached)
- Easels borrowed from USA

Prohibited areas for physical flyers:

Windows, glass doors, light posts, pillars, walls, floors, handrails, bathrooms, outside of class doors, Esplanade.

BEST PRACTICES FOR ADVERTISING EVENTS

- **Branding:** Use only approved WesternU logos (request via studentaffairs@westernu.edu), follow [Graphics & Standards](#), and use the name correctly (WesternU or Western University of Health Sciences).
- **Flyer Content:** Include event details (Who/What/Where/When/Why/Contact), ticket purchasing information if needed, a call to action, and attach flyers in the body of email (not as an attachment).

studentaffairs@westernu.edu

(909) 469-5340

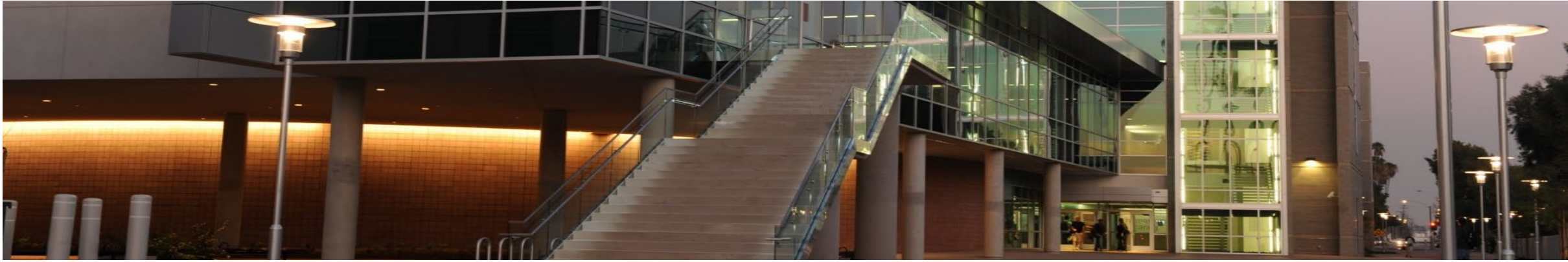
Student Services Center, Room 101

Part 4: Reserving Space & Food Permit Policy

Training provided by University Student Affairs



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You must reserve space!

Even if virtual.

- Club Presidents must reserve the space through University Student Affairs
- Requests must be made at least 10 days in advance
- Class Officers must reserve the space through your college's Student Affairs office
- Your request involves multiple departments so think through your event BEFORE your event is booked
- Don't advertise until your space is confirmed

Knowledge Check!

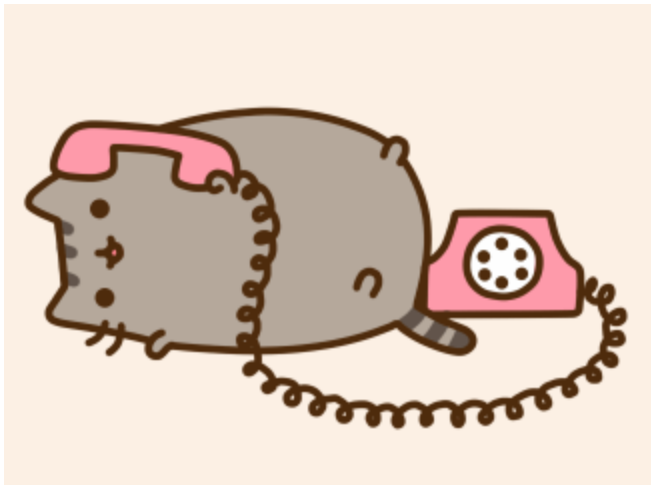


Please check Zoom
to complete the
knowledge check
for Part 3 & 4!

Final Training Takeaways

- 1) Start planning early!
- 2) Involve your advisor and/or college Student Affairs Professional.
- 3) University's tax ID# can't be used – no exceptions.
- 4) Don't apply for a tax ID#.
- 5) Be familiar with University fundraising policies.
- 6) All space must be reserved.
- 7) Serving food? Need permit.
- 8) Not sure? Ask!

Questions?



Student Life & Student Leadership* in Pomona
studentlife@westernu.edu

USA Oregon in Lebanon
studentaffairsOR@westernu.edu

**Previously University Student Affairs*

westernu.edu