Planning & preparation

- All monetary transactions processed by the SA and its clubs require a finance/cost code, prior to your event be sure to request a **New Finance Code**

- Previous codes can be found in the **Finance Code Directory** *(Only accessible through the resources page)*

- If club members plan on paying using their personal card please have them register on the reimbursement system using the **Expense Setup Form**

- Nothing occurs without a finance code
  - Finance code is thee most important part of the finance process- be precise when filling it in
  - Create your finance codes early (before the event) - they take approximately one week to setup – can be used instantly
  - Directory: Once you open the directory, you can share link with your club presidents/ organizers

- Common errors made with finance codes:
  - They need to be related to a specific event (i.e. codes submitted for misc expenses, general club costs will not be approved)
  - Type of Event: "Social" is a paid/ticketed event (Club holds risk) vs "Social Pooled" is where the costs is paid for by the Club and the attendees
  - Start Date and End Date of events is not filled appropriately
  - Edit previously submitted form do not create a new request