

Instructions

Complete the **Student Organization Request (SOR)** form as follows:

1. Type the name of the Payee, or the person/entity receiving the payment.
 - a. If this is a **request for reimbursement of a student**, this should be the name of the student to whom the check should be made out.
 - b. If this is a **request for payment of a third party, another student organization, an on-campus department, or an on-campus service provider** (e.g., DocuZip, Dining Services, etc.), this should be the name of the person, department, organization, or business to which the check should be made out.
 - c. If this is a **VISA Purchase request**, this should be the name of the merchant at which the VISA card will be used. If the card will be used at multiple merchant sites, **a separate form must be completed for each merchant**.
2. Enter today's date in the Date field.
3. Enter the payee's address in the Address field. Addresses for on-campus departments, service departments, or other student organizations are not necessary.
4. From the **Purpose** drop-down menu, select either Request for Payment or VISA Purchase.
 - a. Select **Request for Payment** to pay an on campus service provider, reimburse another department or organization for a purchase, or have a check issued to a Vendor or Individual for reimbursement.
 - b. Select **VISA Purchase** when paying a Vendor with your Visa Purchasing Card. Be sure to follow the proper procedures for using your VISA Purchasing Card.
5. Vendor/Student ID#
 - a. The Vendor ID number is provided to you by the Vendor. This is not required for a VISA purchase, but is required for the University Accounts Payable department to issue a check through the PeopleSoft system.
 - b. For student reimbursements, the student ID number is required and may be found on the back of the student's ZipCard.
6. Enter the name of the person filling out the form in the **Requested By** field.
7. Enter the name of the student organization in the **Student Organization** field.
8. Enter the phone number of the person filling out the form in the **Requestor Phone** field.
9. Enter the preferred e-mail address of the person filling out the form in the **Requestor Email** field.
10. Enter the name of the faculty advisor in the **Advisor Name** field.
11. Enter the name of the student organization's treasurer in the **Treasurer Name** field.
12. Enter the quantity, description/explanation and price of what you are requesting or purchasing. Please use a new line for each new item. If you are purchasing more than ten items, please complete another form listing the additional items. Please refer to the **Sales Tax Notes** for an explanation on how to handle sales tax issues.

13. Summarize any comments or special instructions you want to communicate in the **Comments or Special Instructions Field** (e.g., check needed by (date), contact (name) when check is ready, etc.).
14. Attach to the **SOR** form the following documentation:
 - a. An itemized receipt or invoice in the case of a **Request for Payment**.
 - b. In the case of a **VISA Purchase**, proof of what you plan to purchase, including prices (e.g., cost estimate from vendor or on campus service provider, other applicable documentation based on the situation).
15. Obtain the signatures of both your faculty advisor and your treasurer on the form.
16. Take completed and signed SOR form to Adam Messner in the School of Law Dean's Office.
 - a. If making your purchase with Visa Purchasing Card, follow the procedures outlined in the Visa Purchasing Card Procedure for Student Organizations to check out your VISA.
 - b. Original receipts will need to be attached to the SOR form when you return the card to the Law Dean's Office once the purchase has been made .
 - a. For a **Request for Payment**, the Law Dean's Office will handle the paperwork to request a check or pay an On Campus Service Provider (with an On Campus Order Form, Direct Payment Form or request for a Purchase Order). Typically, an invoice must be attached. If request is for a reimbursement, original receipts must be attached.
17. Purchase information from each SOR form is recorded on to your EAF or SAF accounting worksheets maintained by the Law Dean's Office.
 - a. Accounting worksheets are reviewed and reconciled to the PeopleSoft budget reports each month after Closing.
 - b. Worksheets are distributed each month via email to the student organization president, treasurer and advisor typically around the second week of the month.
18. The SOR form and all supporting documentation is scanned and filed electronically in the Student Organization's file folder maintained by the Law Dean's Office reference and audit efforts. In the case of a **Request for Payment**, the original form and documentation is sent to the University Accounts Payable office.

Sales Tax Notes

The University of Akron is a state funded entity and is a tax-exempt organization. Therefore, we are always exempt from State of Ohio Sales Tax and not subject to many federal taxes. Mention to vendors that we are a state funded entity and exempt from Ohio Sales Tax so that sales tax is not added to the invoice. Vendors not in the State of Ohio may or may not honor our State of Ohio tax exemption status. NOTE: There is a list of states on the Purchasing website that do honor our tax exempt status.

For your reference, the University's Tax Exemption number is 34-6002924 and is also shown on the Student Organization Visa Purchasing Card.

- Some vendors may require a Tax Exemption form before deducting the sales tax from a University purchase.
- Vendors may assign a unique number to UA's tax exempt number and ask you for this number. If a vendor asks for this unique number, it is okay to tell them to use the one they have on file for a particular University of Akron department; otherwise, you will need to complete the Tax Blanket Exemption Certificate and go through the process with the vendor to assign this unique number. You would use this when doing business with this vendor.

State of Ohio Department of Taxation Sales and Use Tax Blanket Exemption Certificate forms may be obtained from the SOuRCe or the Department of Purchasing website. Should you have any questions regarding whether or not tax should be paid, please contact the Department of Purchasing at 330.972.7340.

If you fail to discuss waiving of sales tax from your purchase with the vendor and you are charged sales tax on your purchase, the paid sales tax may be posted to your student organization's SAF account.