First Steps First

• To begin spending groups must first:
  – Complete all Club ReFuel online requirements
  – Review Club Finance 411 and pass the online assessment at:
    https://www.cc-seas.columbia.edu/studentlife/resources/clubfinancetraining

• **All** spending must first be approved by your advisor by submitting a Financial Transaction Form (FTF) through LionLink. An FTF tutorial is available at:
  https://www.cc-seas.columbia.edu/studentlife/resources/clubfinancetraining

• A group must **currently** have enough funds available in their account for the expense to be approved

• For instructions on checking your group’s available funds, refer to the section titled “LionLink – Financial Reports” in Club Finance 411
Common Purchases

See Club Finance 411, your advisor, and/or Student Financial Advising for more details on the following:

• **Promotional Items** must be purchased from a vendor on the list of Approved Promotional Product Vendor. Unapproved vendors cannot be paid for promotional product purchases.
  – Promo items include all branded and non-branded items that are given out or sold for a profit
  – Common promo items include T-shirts/apparel, pens, water bottles, wristbands, banners, *(list not all inclusive)*

• **Travel** (air/bus/rail transportation, lodging, and event registration) requires use of the Student Financial Advising Travel Card
  – Use of the travel card is by appointment only with a Student Financial Adviser
  – To schedule a travel card appointment you must first register your trip at: [https://www.cc-seas.columbia.edu/studentlife/studenttravel/form](https://www.cc-seas.columbia.edu/studentlife/studenttravel/form). Confirmation of your registration will be made prior to an appointment being booked.

• **Food** should be purchased from a vendor off the list of Vendors Who Accept FTF’s
  – For special food needs please speak to your advisor
  – *NEVER* tip more than 20% on service or 15% on delivery

• **Performance agreements** may only be used for performers
  – Performers include singers, dancers, musicians, actors and artists
  – See Club Finance 411 sections titled “Performance Agreement” and “Other Common Contractual Purchases”
Check with your advisor and/or Student Financial Advising before you make any purchase as some items require a contract, purchase order, additional paperwork, and/or may be restricted.

Groups with no funds remaining will not be allowed to continue to make purchases.
- Governing boards and advisors are provided with a weekly report on groups in overdraft and groups with no funds remaining will immediately have purchasing activity suspended.

Illegible and incomplete documents cannot be paid as per Accounts Payable policy.

Out of pocket expense reimbursements are by exception only and require prior advisor and Student Financial Advising approval.

Payment for services can never be made with cash, including from funds raised at a program or event.

Contracts/documents must always be reviewed by Columbia Purchasing and cannot be signed by anyone but a Purchasing representative.

Purchases over $2500 require a purchase order.

Personal vehicles should never be used for group activities/business.
- Vehicle must be rented through Hertz.

You or your group may be liable for payment of items purchased outside the approved purchasing mechanisms.