

WUCL Student Organization Orientation

**I'VE BEEN ELECTED TO THE
EXECUTIVE BOARD!!!**

NOW WHAT?

Willamette Resources



Office of Student Affairs (OSA), 2nd floor

Contact Maegan Dunlap for commencement/graduation information, ADA Exam Accommodations and registration related questions.

mdunlap2@willamette.edu



Contact Andrea Saele for scheduling classrooms in law building.

asaele@willamette.edu



Contact Ann Allen for budget access, student organization rosters updates, reimbursement requests and travel coordination.

aallen2@willamette.edu

Note: The OSA open window hours: **Monday, Wednesday & Friday** 8:00am-2:00pm. Office hours via Zoom on **Wednesdays** from **2-3 PM**

Placement Office, 2nd floor



Contact Marti McCausland to minimize event conflicts with Placement events

mmccausland@willamette.edu

*****Please remember*****

Wednesday lunch hours are reserved for the **Placement Office** events.
Contact Placement with questions.

Willamette Integrated Technology Services (WITS)



Contact Jim Cureton for WITS support/Zoom Support

jcureton@willamette.edu

Contacting WITS for tech help - WITS Help Desk (503)-370-6767

wits-info@willamette.edu

Graduate Alumni Relations



Tiffany Newton - Director of Graduate Alumni Engagement

trnewton@willamette.edu

Please contact Tiffany prior to planning fundraisers to be sure we don't overlap with fundraising efforts for the University.

She can also help with outreach to alumni for donations, publicity, speaker requests, etc.

Fundraising

Collecting Funds for a Fundraiser

The University is now CASHLESS!

Credit Card Machines available to borrow - check out from the Cashier's office for up to a week at a time. Cashier's office located in building behind the law school

<https://willamette.edu/offices/cashier/merchantservices/index.html>

- Only wired machines work in Law School
- Wireless options on campus – machines WILL NOT work off campus
- Square now available – 2.75% fee charged per swipe

TouchNet Marketplace - WITS can help

You can set up your own Marketplace with your own Square Willamette is now offering to set up groups with with a Square Terminal and a Square merchant account. **The machine costs \$299.** Allow a month to get the equipment ordered, account set up, and equipment set up on our network.

Organization Accounting

Accessing GL Reports

Log into **Student Portal**

Welcome to the Student Portal

We appreciate your [feedback and suggestions](#) about our portal.

[WISE](#)

[ZOOM](#)

[DISTANCE LEARNING](#)

[WORKDAY](#)

[SAGE](#)

[EVENT SCHEDULING REQUESTS](#)

[FORMS](#)

[HANDSHAKE](#)

[JASON](#)

[LINKEDIN LEARNING](#)

[STUDENT SELF-SERVICE](#)

[BEARCAT BNB](#)

Organization Accounting

- Organizations should email Ann Allen with the names of the President and Treasurer and she'll request budget access from Accounting.
- Established groups already have a budget and general ledger number (GL#). Budget information is accessible from **SAGE**
- You will use the GL # for:
 - ✓ expense reimbursements
 - ✓ making purchases on campus (Bon Appétit, Print Design, etc.)



- An example of a GL number: ***Fund*** ***Unit*** ***Object***

21 - 9WXXX - 2213

OR

5WXXX

Organization Accounting

Click on **Financial Management**

Hello, Welcome to Self-Service!

Choose a category to get started.



Financial Management

Here you can view the financial health of your cost centers and your projects.

In Financial Management Overview choose **Finance Query**

Financial Management Overview



Budget to Actuals

Here you can view the financial health of your cost centers.



Finance Query

Here you can query your financial data.



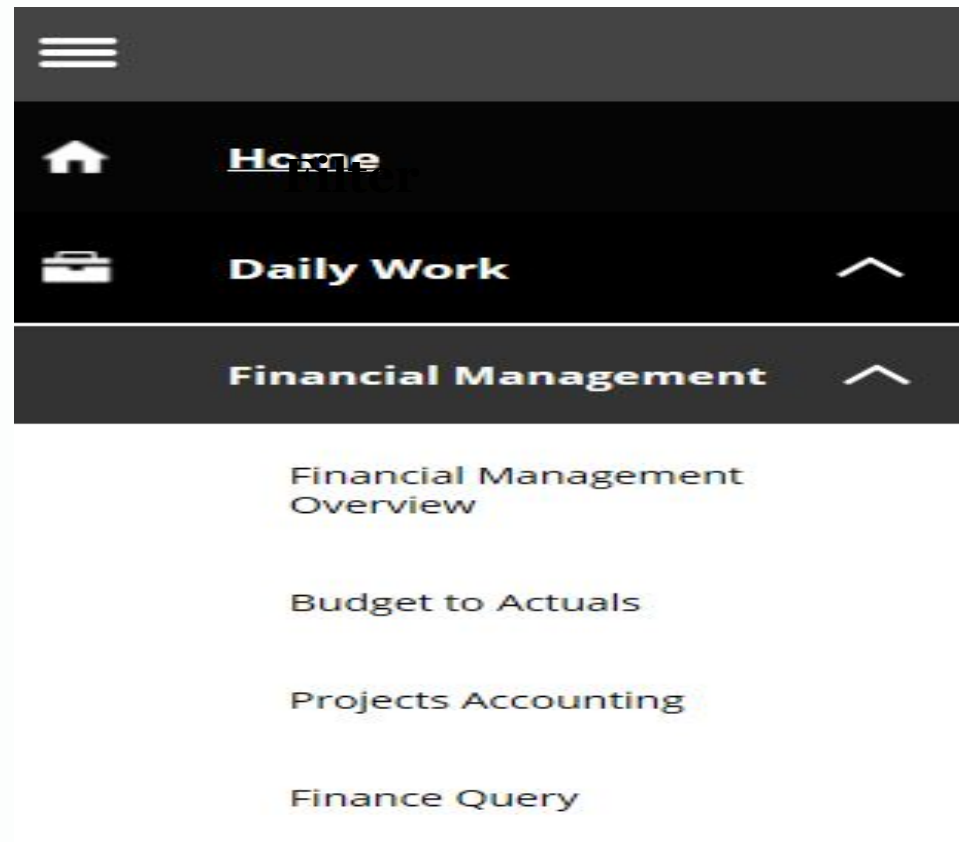
Projects Accounting

Here you can view the financial health of your projects.

Organization Accounting

No Financial Management tab?

Try the side bar menu under Daily Work



Organization Accounting

Click **Filter**

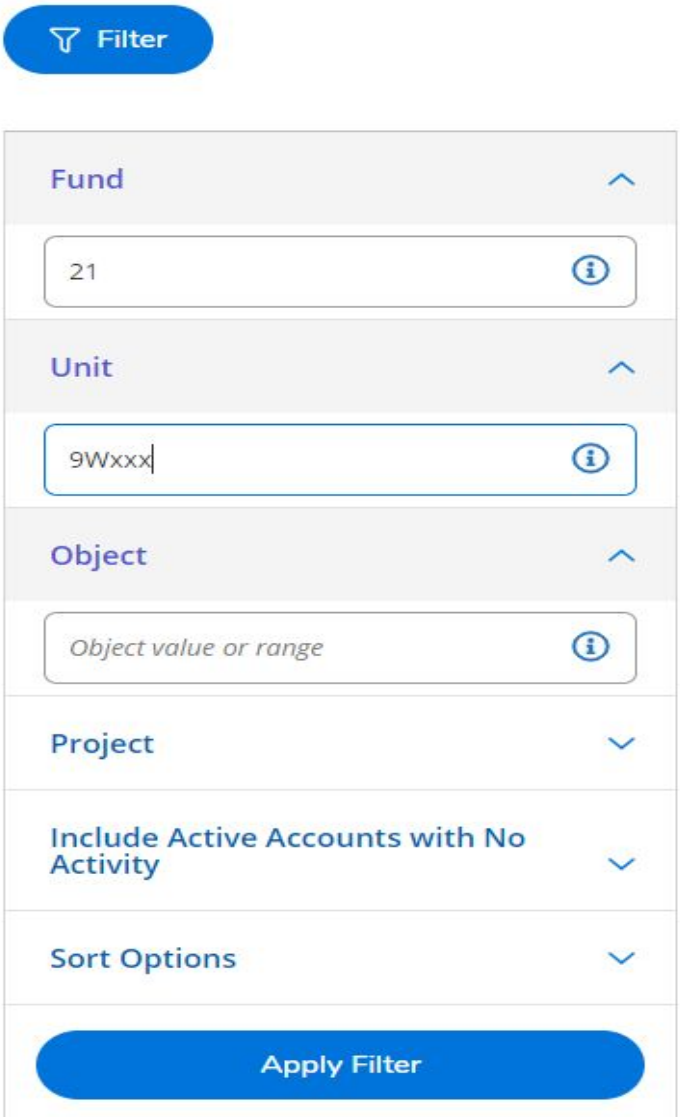
Fund – 2 digits

- 21 – groups who receive SBA funding
- 10 – groups funded via the University (Law Review, WLO, Moot Court, WJILDR)

Unit – 5 digits

- 9Wxxx or 5Wxxx– most student organizations (funded by SBA)
- 10xxx - WLO, Moot Court, WJILDR
- or 20xxx – Law Review

Object - leave blank to bring up all accounts for the group



The screenshot shows a filter interface with a blue 'Filter' button at the top. Below it are several filter categories, each with a dropdown arrow and an information icon:

- Fund**: A text input field containing '21'.
- Unit**: A text input field containing '9Wxxx'.
- Object**: A text input field containing the placeholder text 'Object value or range'.
- Project**: A dropdown menu with a downward arrow.
- Include Active Accounts with No Activity**: A dropdown menu with a downward arrow.
- Sort Options**: A dropdown menu with a downward arrow.

At the bottom of the filter interface is a large blue button labeled 'Apply Filter'.

Google Groups Access

- Organization mail groups are now Google Groups – Access via 9 dot grid – Click on “Groups” icon:



- Group presidents and treasurers will be “Owners” of the organization groups, so they can add/delete members
- Messages subject to approval – please use for student organization & SBA events and school related activities only
- Keep in mind that time of day can affect how quickly messages post

Google Groups Access

- Law-stu and class groups are now:



Willamette College of Law - All Students

law-students@willamette.edu
All Law Students



Willamette College of Law - Class of 2021

law-2021@willamette.edu
All Law students graduating in 2021



Willamette College of Law - Class of 2022

law-2022@willamette.edu
All Law students graduating in 2022



Willamette College of Law - Class of 2023

law-2023@willamette.edu
All Law students graduating in 2023



Willamette College of Law - Master of Laws Students

law-llm@willamette.edu
All Law LLM students

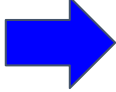



Willamette College of Law - Master of Legal Studies Students

law-mls@willamette.edu
All Law MLS students

Expense Reimbursements

Keep all **itemized** receipts to submit for reimbursements

- No more Petty Cash - All reimbursements use this form! 
- Form is located on the Student Portal under 
- Requests must be submitted within **30 days** of purchase
- Must include itemized receipts
- Must be submitted to Accounting electronically - Ann can submit them for groups
- Be sure to include your student ID number
- ****Sign the form under your name and get an approval signature on bottom-Electronic signatures ok**
- Group Presidents and Treasurers have signature authority

Willamette University Expense Reimbursement Request			
<i>To be completed by person to be reimbursed:</i>			
Name (please print)	Department	WU Student/Employee ID#	
Signature	Travel Destination	Mailing Instructions (check one):	
Business Purpose (Be Specific):		<input type="checkbox"/> E-Check (Direct Deposit) <input type="checkbox"/> Campus Mailbox <input type="checkbox"/> Pick-up at Accounting <input type="checkbox"/> Mail to:	
Original itemized receipts must be attached to this form. Please tape small receipts to a separate sheet of paper in the order as listed.			
Exchange rate if traveled abroad:			
Date	Vendor	Amount	
Meals (List each receipt separately. If hosting, include list of attendees)			
			Sub-Total
			\$ -
Lodging			
			Sub-Total
			\$ -
Transportation (Airfare, Gas, Parking, Rental Cars, etc.)			
			Sub-Total
			\$ -
Conference Registration			
			Sub-Total
			\$ -
Miscellaneous Expenses			
			Sub-Total
			\$ -
<i>To be Completed by Department:</i>			
GL Account #	Amount	Advances Received	
		Check#	Amount
Total (must equal Balance Due)	\$0.00		
		Page 1 Total	\$ -
		Page 2 Total	\$ -
		TOTAL OF ALL EXPENSES	\$0.00
		Subtract Advances	
		Balance Due Employee	
		Balance Due University	
I certify that I have reviewed this payment and find it to be in compliance with established Purchasing and Accounting policies. If the person to be reimbursed is the budget approver, then the immediate supervisor should approve this request.			
APPROVED BY (print name)	SIGNATURE	DATE	

Expense Reimbursements

Setting up Direct Deposit for E-Checks through SAGE

- From the *Welcome to Self Service* page click **Banking Information**.
- Click **+Add an Account** on the right hand corner.
- Slide the **Activate** button to the right to turn it on & click Next.
- On the next page enter **Routing Number, Bank Account Number**. Select Account Type (Checking or Savings).
- At the bottom of the page check the the **Terms and Conditions** box.
- Click **Submit**

Hello, Welcome to Self-Service!

Choose a category to get started.



Banking Information

This is for Accounting and Student Accounts direct deposit enrollment separate from Payroll.

+ Add an Account

Event Promotion

Please plan on only Zoom Meetings and remote events until further notice



Contact Cindy Cromwell - Communications Manager

ccromwell@willamette.edu

Get help with:

- Creating slides for the law school digital displays
- Submitting your event to the **Law Events Calendar** and **Student Activities Calendar**
- Posting your event information on the *Willamette Current Students* Facebook group and the college's Instagram account
- We recommend submitting information 4 to 5 days in advance of the event to get the event published in time!

Event Promotion

Boosting Meeting Attendance with Incentives

Use the words “**Giveaways**” or “**Doorprize**” or “**Drawing**”. Please don’t use “*Raffle*”!

- Raffle is a term used for collecting money and giving out a prize at a later date (like a lottery ticket). WU does not have a raffle license
- Remember that **gift cards cannot be reimbursed** - make giveaways tangible items
 - ✓ Reimbursement requests should be submitted within **30 days** of when the expense was incurred
- Be mindful about keeping the cost of incentives reasonable
 - ✓ Money allocated from SBA is part of the fees every student pays. Take the perspective of those not involved in your organization -- would they be OK with their own student fees being used as an "incentive" to encourage attendance?

Event Planning

Hosting a Zoom Event

- Become familiar with Zoom's policies:
<https://zoom.us/docs/en-us/acceptable-use-policy.html>
- Avoid “zoom bombing” by utilizing the waiting room feature so guests can be verified
- For large public events, consider doing a **Zoom webinar**. Participants do not have audio or video, they are only able to see and hear the presenters, and are able to submit written questions
- When advertising an event via social media, **request RSVPs**, then email registrants the link and password once they have been verified. Host should allow event entry for only RSVP guests via the waiting room.

Event Planning

Guidelines for planning a Movie Watch Party

- Choose a platform that is already set up to hold a "watch party" like Amazon Prime or Netflix. Streaming a movie over Zoom by sharing a computer screen is a violation of Willamette's user agreement
- Be aware of your chosen platform's viewing policies, such as limits on number of viewers
- Let OSA know if your groups needs advice on how to purchase the copyright to a movie for a public viewing

Student Bar Association

SBA: “An organization for the control of all matters of general student concern.”



President	Patsy Shaha	Preside over meetings. Carry out the SBA Constitution and Bylaws.
1 st Vice President	Mackenzie Schmitt	Run elections, oversee appointments to committees, conduct President meetings
2 nd Vice President	Kristen Varda	Social chairperson
Secretary	Trish Conlon	Minutes kept and posted
Treasurer	Kirsten Parsons	Keep accounting, Chair Budget Committee, liaison with organization Treasurers
Ombudsperson	Zoe Janachek	Contact with outside vendors, Budget Committee member cleans refrigerators
ABA Liaison	Nathan Claus	Update on ABA issues/opportunities
JDA Representative	Andrew Hendrie	Liaison with Business school

The 1L, 2L and 3L Presidents each have a seat on the board. They have a vote and are responsible for bringing issues forward from each of the classes.