How to Sign-up for Campus Vine

Step 1: Go to Campusvine at www.campusvine.com and click “Sign Up” in the top right corner.

Step 2: Enter the requested information and accept the Privacy Policy & Terms of Use. You must use your Stony Brook email address.

Step 3: Verify your email address by clicking the link in the email from Campus Vine.

Step 4: Fill out the Signature Verification Form and drop off at the RHA/NRHH office.

How to Allocate:

Step 1: Go to Campusvine at www.campusvine.com and click Login in the top right corner.

You will use your Stony Brook email address and the password you created when signing-up. This is NOT your NetID username and password.

Step 2: Click on Allocate

Note: if you are a member of multiple clubs, you may need to switch to “(Position Name) of (Hall Council name) by clicking your name in the top right corner.

Step 3: Click ‘Voucher’ underneath Banana Stand

The Banana Stand is a Campusvine term for non-event vouchers. You are not required to create “Events” for your programs; also one voucher can be submitted for multiple programs.
**Note:** The treasurer should be the one filling out the Voucher as best practice for responsibilities; however, any E-Board member can actually do so.

**Note:** Reimbursements must be pre-approved in advance by RHA and USG. Submitting a reimbursement without pre-approval will result in an automatic rejection.

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**Step 4: Fill out the New Voucher Form.**

**Notes:**

- The Appropriation should read “2014-2015 Budget"
- Check Delivery should be “Pick-up Check"
- Justification for the event and the money needed. (See the Allocation FAQ for guidance on justifications)
- The list presented for Vendors is an exhaustive list of all USG approved vendors.
- **Note:** Not all vendors or appropriate or are useful for hall councils; however, hall councils will be able to use any vendor (within reason).
- **Note:** Some vendors appear on the list, but are DISABLED (i.e. Walmart). Be sure you can click on a vendor without a pop-up message before allocating to the vendor.

- “What are you buying” should contain a detailed list of supplies that will be purchased
  - OK: soda, cookies, chips, plates, napkins, cutlery,
  - Not OK: food, supplies, decorations
- **Note:** you do not have to list each item as an individual line: the list can be one line comma separated with Quantity 1, and Unit Cost equal to the total allocation
- **Note:** If you are placing an order with an online vendor (i.e. Amazon, Oriental Trading, Etsy, etc.), then include the links to the actual item to be ordered. Be sure to account for shipping that will be charged!

- Click Create Voucher
  - Changes cannot be made to vouchers once created.

**Notes:**
- Shopping carts for online orders are no longer required.
- Meeting information is no longer required. However, the secretary still must take attendance and record the motion to vote on an allocation. (At a general hall council meeting the general body should be proposed with an allocation. They should be given information about the amount, what is being bought, and what it’s for. Then a vote should occur. The number of people who voted for, against and abstained needs to be recorded in the minutes).
Step 5: Hall Council Signatures and Upload Files

1. **Upload any files that are required.** Examples include:
   a. Food Permits
   b. Invoices
   c. Please review the Allocation FAQ for when these documents are required
2. **Make a note of the voucher ID** (in this example: FEE44) (this will be unique to each submission, and will be used to reference the vouchers to RHA)

3. **Sign the Voucher. Signatures can now be in any order!**
   a. The Treasurer, President and Advisor, must separately log into Campusvine, view this page, and sign the voucher by clicking “Sign Voucher”.
   b. The Treasurer (since he or she already is here from having created the voucher, can simply click “Sign Voucher”).
   c. Once signed, the page will reload and the button will disappear.
4. **President Signatures**

The President and Advisor must independently sign the voucher. Log into Campusvine as in Step 1. Click on “Allocations” on the left-hand side.

- There will be a list of vouchers that are not yet fully signed. These will say “Club Approval” under status.
  - Note: You may have signed a voucher, but it may still be in “Club Approval”, because others have not.
- Click on the voucher.
- Review the allocation. For example:
  - Did the vote occur at hall council general body?
  - Is this what we plan to spend the money on? (Items and Justification accurate?)
  - Is this a fiscally responsible use of the money?
  - Is the vendor correct?
  - Are the required documents present?
• If everything is accurate and complete, click “Sign Voucher”, otherwise discuss the issues with the Treasurer, and have him or her Delete the Voucher by clicking “Delete Voucher” in the top right corner.

5. Advisor Signature

The Advisor must also sign the Voucher just as the President would, reviewing for accuracy and completeness. Additionally, the Advisor must use professional judgement to ensure not only is the voucher is responsible, but is this an appropriate use of the money in terms of Campus Residences’ policies including those on safety and programming.

Barring any issues, the Advisor may click “Sign Voucher”

Please keep in mind the following, Per the “2014 Responsible Hall Council Funding Act” in the USG Senate:

• “A Residence Hall Director … may not veto any expenditure of a Hall Council or Quad Council including its placement on the Hall Council or Quad Council Agenda. If the RHD wishes to prevent the expenditure, he or she may send a written request to the Vice President of Finance of the RHA who may consider his or her request during their approval of the expenditure. A copy of this request must also be sent to the USG Treasurer.”

• “Any Hall Council and/or Quad Council expenditure may not:
  ○ … Be for the purposes of funding an event in which an RA is using towards his or her programming requirements; or
  ○ … Be used for purchases that may be considered – building maintenance and would otherwise be paid for by Campus Residences. … This clause shall not be misconstrued to include purchases for common areas of the building that build community amongst its members.”

6. Final Signature

Once the last signature is made, the voucher moves to RHA and can no longer be deleted! If you wish to cancel a voucher simply make a comment on the voucher, and the voucher will be rejected.
Step 6: RHA Approval

- After the RHD approves the Voucher, the RHA Advisor, RHA President, and RHA VP of Finance must approve the voucher (in that order). You can see the stage the voucher is in at any time.

1. Club Approval
2. RHA Advisor Approval
3. RHA President Approval
4. RHA VP Finance Approval
5. FSA Fiscal Agent Approval
6. FSA Bookkeeper Processing
7. RHA Check Printing
8. Check Ready for Pickup by RHA
9. RHA Processing
10. Check Ready for Pickup by Hall Council
11. Awaiting Receipt from Hall Council
12. Awaiting Receipt from RHA
13. Complete

- You may receive emails that the Allocation is “On Hold.” This means there is some deficiency that can be resolved, but either adding additional information or documents (as comments or attachments)
- If the allocation is “Rejected”, it can not be resolved and must be resubmitted.
- Email notifications are not sent out for approvals or when checks/packages are ready for pickup. The hall council is responsible for monitoring Campusvine to see when checks/online orders are ready for pickup.

Step 7: Pick-up and Spend the Money

When the Voucher reaches “Check Ready for Pickup by Hall Council”, any member on the Signature Verification Form can pick-up the check. The check must be picked-up within three weeks of that status update, and the receipt must be returned within one week of picking-up the check. The receipt is scanned and uploaded to Campusvine for future reference by the hall council.