

# Budget & Bank Account Info Session



**Pathfinders**  
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**USGA**

Fall 2025



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# Who Are the Pathfinders

## Consultations

- Involvement Consultations
  - Students interested in getting involved
  - Provide information on organizations of their interest and how to get involved in them

## Organization Support

- Student Org Support Consultations
  - Event Booking
  - Space Booking
  - Engage help
  - Bank Account



Schedule a Consultation with a Pathfinder!



# Necessary Components to open a Bank Account

## Employer Identification Number

- The official number registering your organization with the IRS
- Any financial accounts managed for the organization should be under this number

## Bank Account

- Allows organizations to..
  - Collect and store money
  - Have a debit card for the organization (expenses, cash, reimbursements)
  - Makes sure that no one is using their own personal money or accidentally using organization money

## iSupplier

- Any student organization that receives any university funding (including USGA) must create an account with iSupplier for any vendors.
- Fill out a W-9 Form
- **Contact: Jeremy Hilson**
  - Email: [jhilson@uab.edu](mailto:jhilson@uab.edu)
  - HSC RM. 230

# Employer Identification Number

- **Start the Application** - Click “**Apply Online Now**”, then “**Begin Application.**”
- **Select Organization Type** - Choose “**View Additional Types including Nonprofit/Tax-Exempt Organizations**”, then pick “**Community or Volunteer Group**” or “**Social or Savings Club.**”
- **Confirm and Continue** - Read descriptions, confirm your choice, and proceed.
- **Complete Form** - Enter required details and submit.
- **Get EIN** - Receive your EIN instantly as a PDF (CP575 Confirmation); print and save it.
- **Current and future officers will need this document!**



# Letter of Registration (LOR) Process

- Once you have your EIN number, you will submit a request using the “Official Letter of Registration Form” on engage
- A Pathfinder will review your form to ensure that your organization has been approved for organization registration and we will ensure that you have included the necessary information.
- Once your submission has been approved, you will receive a closing comment with a downloadable file including your official Letter of Registration (LOR).



# Opening a Bank Account

- 1. Get an EIN** - Apply for an Employee Identification Number.
- 2. Hold a Meeting** - Record intent to open a bank account, meeting details (date, time, location), officers with account access, and the bank's name and address. Include the EIN once obtained.
- 3. Submit Request** - Use the "Official Letter of Registration Form" on Engage.
- 4. Prepare Documents** - Print the Letter of Registration, EIN confirmation, and meeting minutes.
- 5. Open the Account** - Bring all documents to the bank to finalize the account setup.





QR for EIN#



W-9 Form



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# Budget Timeline



# Budget Request



# Form Guidance



The purpose of this session is to guide RSOs through the steps to apply for a budget.

- Filling out Budget Request through Engage
- Filling out “[Event Detail Form](#)”
- Submitting receipt for events - “[End of semester Reports](#)”
  - Forms available on engage application
  - End of semester is *optional*

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# How to Request a Budget

1. Access the **Engage** using your UAB account.
2. Go to your specific student organization's page.
3. Click on the "**Finance**" tab.
4. Select the option "**Create Budget Request.**"
5. Complete all the required fields with the necessary details.
6. Attach any supporting documents to justify the request.
7. After completing the form, **submit** the budget request for review by the USGA.



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# Budget Analysis

- The following criterias will be considered:
  - Number of active members
  - Scale of events
  - Amount of previous money used
  - Is the organization finding the cheapest options?
  - Is this a collaborative event?
  - Is this an academic workshop?
- Fundraisers will be the top priority when being considered for funding



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# Events Compliance

- **Prohibited Events:** Any event promoting "divisive concepts" or connected to Diversity, Equity, and Inclusion (DEI) programs as previously defined, such as those focusing on race, gender identity, or socio-political issues, will no longer be eligible for funding. [Guidance for Compliance.](#)
- **Eligible Events:** Events that focus on student success, academic enrichment, or general campus engagement, including leadership programs and service-learning activities, are more likely to receive funding.
- **General Compliance:** All events must align with the new focus on inclusivity without promoting divisive concepts, ensuring broad access to resources for the entire student body.



# Budget Hearings

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# Budget Hearing

- A budget hearing is an informal meeting conducted by the Division of Finance to better understand **what is potentially being funded.**
- Organizations can **rank** events in significance to determine which events are prioritized over others.
  - It is highly recommend that **fundraisers** are towards the top of your list.





# Budget Allocation

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# Budget Allocation

- Upon completion of all budget hearings, the Division of Finance as well as members of the USGA Senate will finalize the allocation of all RSO budgets for the upcoming semester considering event feasibility, impact, and eligibility.
- Official budgets for the applicable semester can be found on **Engage** once the final budget is **approved** by the Senate.



# Deposits

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# Direct Deposit

- The funds will be sent to the organization through **direct deposit**, therefore, it is important that the bank account is active and officers have access.
  - Ensure that **W-9** information is correct:
    - Address - should be residential or office of advisor
    - Account Name
    - EIN
  - Make sure the Engage roster and leadership team is **updated** as we often **contact** the new officers through the contacts listed there
- Incorrect information in any step will lead to delays in allocations.





# RSO Collaboration

The Division of Finance is strongly encouraging **collaboration** amongst RSOs. This maximizes your chances of hosting events, and this also maximizes turnout rate!

**UAB USGA'S FUNDING IS SUPPLEMENTAL!** It always has been, but in these trying times, we cannot be your only source of funds. We can connect you with local businesses, but it is upon you to do the convincing.



# Questions?

