

## Activity Request Form Changes:

- 1) Student submissions – I have updated the routing so that any student can submit a form on behalf of a club or the ASB. Below are the routing questions for step 1, which I will be reorganizing soon to be better stated.
  - a. If the student is submitting for a club, they will select the first option, “Student submitting for club.” This will route the form to the Club advisor for approval and then on to the treasurer/president.
  - b. If the student is submitting for the ASB, they will select either “ASB Activity: facility use approval required” or “ASB Activity: no facility use required”.

The screenshot shows the 'Step 1: Initiator' screen of a form. At the top, there's a purple header with the title 'Step 1: Initiator' and a link 'Update step'. Below the header is a navigation bar with tabs: 'Approvers', 'CC / Notifications', 'Routing Question' (which is selected and has a green checkmark), 'Instructions', and 'Reminders' with a 'Now' button. The main content area is titled 'Question' and says 'Please select from the options below.' Under 'Answers', there are seven options, each with a right arrow and a destination step:

- Student submitting for Club → Goes to Step 2
- Club Activity: students will sign electronically → Goes to Step 3
- Club Activity: student signatures attached; no facility use required → Goes to Step 6
- Club Activity: student signatures attached; facility use approval required → Goes to Step 5
- ASB Activity: facility use approval required → Goes to Step 5
- ASB Activity: no facility use required → Goes to Step 7
- Scholarship Fund, or similar → Goes to Step 9

- 2) There is a new required field at the top of the form to select who the requester is. If the club advisor is submitting the form, they will select “Advisor” and the signature box will then display at the bottom of the form as a required field.

The top section of the form includes a 'School Site' dropdown menu and a 'Requester:' dropdown menu. The 'Requester:' menu is open, showing options: 'Select...', 'Select...', 'Student', 'ASB Advisor', and 'Advisor' (which is highlighted in blue). Below these are fields for 'Activity/Fundraiser/Purchase Request #' and 'Requests submitted'. A note states: 'Requests must be submitted at least two weeks before event. Requests submitted less than two weeks before the event will not be permitted to take place.' Below this is a signature section with a line for 'Club Treasurer Signature', a button 'Click to sign here', a date '8/20/2025', and a line for 'Club Advisor Signature'.

\*The club advisor will now always be required to add their signature whether during submission at step one, or after a student submits the form, at step two.

- 3) When a form is routed to the Principal/Designee (step 10), there is now a required field where they must answer whether a vendor agreement is needed. If “yes” is selected, the signature box will appear as a required field allowing the principal/designee to authorize the agreement.

Event Type:

Activity and/or future purchase: Test

Fundraiser:

Using Vendor? No ☒ Yes Vendor(s): Vendor XYZ

When applicable, administration must approve all vendor agreements by signing below.

Click to sign here 8/20/2025 Is a vendor agreement needed? Yes  Yes  No

Principal/Designee Signature Date

Date(s) Requesting: From mm/dd/yyyy To mm/dd/yyyy

Setup time: Event Duration: Teardown time:

\*Vendor agreements are generally required for contracted services. Please reach out to Purchasing with questions relating to these.

- 4) Revenue actuals – Our auditors recommended we begin tracking revenue estimates vs. actuals, so one additional step has been added to the end of the routing on this form to capture that information. Once the form has gone to the accounting assistant, they will be asked whether the form indicates revenue potential. If the answer is “no”, the form will be completed; if they answer “yes”, the form will then go back to the original advisor (club or ASB) who will be required to complete the following information once the fundraiser/activity is over.

**Actual Revenues**

Complete section below if any money was collected at any time during or for the activity:

1. Actual revenue: 12 number Date deposited 12 mm/dd/yyyy

2. Actual expenses: 12 number Actual number of items/services sold (if applicable) 12

3. Net profit 12 = f87-f88

12 comments relating to final revenue collections, if needed

\*This is a work in progress and subject to change. For now, if the activity is on-going/all year long, the accounting assistants can select “no” to the routing question and complete the form. In late May, I will run a report to identify any revenue actuals that need to be completed and re-open those forms for editing, as appropriate. If the activity is a one-time, or short-term event, this portion of the form should be completed as soon as possible once the event has ended. The form will then be finalized. If the fundraiser/event is cancelled, please indicate that information in the comment box, put 0’s in the revenue and expense fields, and complete the form.