**Instructions for Intake Form**

1. The intake form can be found in the drive under “Intake Form”
2. When sending the initial reply email to the club to set up a date to meet, attach the intake form in the message and mention that this form will be used throughout the meeting. Inform clubs to look over the form but be sure to state that they do not need to fill it out before the Zoom meeting if they do not want to/ are unsure of what to do
3. During the Zoom meeting with the club, you the Auditor will fill the form out with the club representatives so you should share your screen as you fill it out
4. When sending the final email to the club informing them that the audit is complete, attach the finished intake form as a pdf so that they can look it over/ email any adjustments if necessary/ have it on record

**Questions to Ask:**

* To the club members:
  + How is the club performing this semester?
  + What type of activities are currently being hosted now? What are your plans for next semester/year (\*based on covid situations\*)?
  + How long have you been involved in the club?
  + Brief understanding of the auditing process?
  + Does the club have any miscellaneous generated revenue?
  + How does the club generate revenue? (if relevant)
* Briefly explain the auditing process to the members and ask for preliminary questions before the audit
* General Questions Depending on the Scenario
  + Why was X amount used for Y category during the fall/spring semester? (Especially for larger amounts)
  + Why did the club not have any allocations for the past (two) semester(s)?
  + Have you returned the excess money?
  + What is the remaining amount on SABO?
  + Why were the funds not used - depending on the categories?
* Are there any particular questions that you have about the Allocations process or the audit process (maybe link a Google Form since they may not send emails)
* Sending fund breakdown within 5 business days

**Intake Form**

**Instructions:**

* Before the Audit
  + Auditor
    - Access and read through the SABO records of the club to be audited
    - Take note of any particular large sums of money or discrepancies
    - Send Audit email to the Club Email, Club President and Club Treasurer, cc’ing the advisor & send a follow up email with the invitation to the meeting
      * Include the Intake Form and brief description of what the document would be used for
    - Review the Intake Form and fill out preliminary information such as Date of Audit, Auditor Name, Club Name, SABO details, Advisor, Semesters Audited
    - Add entries for transactions for the given semesters and add descriptions if applicable
      * Create copies for the entry table if applicable
* During the Audit
  + Auditor:
    - Introduce yourself, position in the Allocations Board, school year, major
    - Briefly go over the Audit procedure and explain the use of the Intake Form
    - Ask if they have any questions before the process
    - Ask preliminary questions to the club officials
      * How is the club performing this semester?
      * What type of activities are currently being hosted now? What are your plans for next semester/year (\*based on covid situations\*)?
      * How long have you been involved in the club?
      * Brief understanding of the auditing process?
      * Does the club have any miscellaneous generated revenue?
      * How does the club generate revenue? (if relevant)
    - Refresh on the RUSA Allocations guidelines document to refresh
    - If the audit is being conducted online, make sure to share the screen with the other participants in the meeting for transparency
* General Questions
  + Why did the club not have any allocations for the past (two) semester(s)?

**General Information:**

Date of Audit:

Auditor:

Club Name:

Sabo Number:

Advisor:

Semesters Audited:

* General Questions for Program Allocations
  + Why was X amount used for Y category during the fall/spring semester? (applicable especially for larger amounts)
  + Did the club use RUSA-approved vendors?
  + Have you returned the excess money?
  + What is the remaining amount on SABO?
  + Why were the funds not used - depending on the categories?
  + (If a particular entry doesn’t have a description) - what was the money used for?

**Programs**

Event 1 Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Event 2 Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Event 3 Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Event 4 Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

* General Questions for Overhead Allocations
  + Why was X amount used for Y category during the fall/spring semester? (applicable especially for larger amounts)
  + Did the club use RUSA-approved vendors?
  + Have you returned the excess money?
  + What is the remaining amount on SABO?
  + Why were the funds not used - depending on the categories?
  + (If a particular entry doesn’t have a description) - what was the money used for?

**Overhead**

Semester:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |

Total Spent on Overhead:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Semester:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |

Total Spent on Overhead:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Semester:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |

Total Spent on Overhead:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Semester:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |

Total Spent on Overhead:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

* General Questions for Special Allocations
  + Why was X amount used for Y category during the fall/spring semester? (applicable especially for larger amounts)
  + Did the club use RUSA-approved vendors?
  + Have you returned the excess money?
  + What is the remaining amount on SABO?
  + Why were the funds not used - depending on the categories?
  + (If a particular entry doesn’t have a description) - what was the money used for?

**Special Allocation**

Event Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

Event Name:

Semester and Date of Event:

Amount Funded:

Purchases/Expenses: (Insert Additional Rows to Table if Needed)

| Description | Amount Spent |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

Total Spent on Event:

Total Amount Provided by Outside Funding:

Unused Funds Amount, if any:

Additional Details (For example: reasons for budget overages, details for why funding wasn’t used, etc):

* Are there any particular questions that you have about the Allocations process or the audit process (maybe link a Google Form since they may not send emails)
  + A google form for queries/comments/suggestions
* Update about sending fund breakdown within 5 business days
* Once approved, the club will receive a confirmation email from the Allocations Board about audit completion with a copy of the Intake Form for their reference

**Section for General Notes:**

(Section to take any notes)