

Quick Guide to Making a Request on SUMS

1. Log into Sums (brandeisweb.com), using your club's username and password.
2. Go to the "Requests" tab on the top of the page and select the type of request you would like to make (i.e. PRF, NEPRF, SPF, or PO)
 - a. You will now see your history of requests of that specific type.
3. Click "new" on the top of the list
4. Fill out the form
 - a. **Fields that must be filled out:**
 - i. Provider Type
 - ii. Is the person/vender being paid a student, University employee, or outside vender?
 - iii. Provider Name
 - iv. To whom should the check be made?
 - v. Description of what the payment is for **(Be specific!)**
 - vi. Handling Instructions
 - vii. How will the check be delivered to the person?
 - viii. Address where to send the check
 1. Could be School MB, MS or regular address
5. Press "Save and Close"
 - a. **You are not done yet!** This just made a general request for a single person/vender, but not for a specific item.
6. On the bottom of the page, will see a box that says (PRF, NEPRF, SPF...) Items".
7. Click "New"
 - a. On this page you will be able to specify each item/receipt
8. Fill out the form
 - a. PSAccount Code
 - i. Under which category does your item fall?
 - b. Chose a the fund from where the payment is being made
 - i. If it is coming from SAF, the item must be something that your club was allocated money for.
 - c. Enter Amount
9. Select "Save and Close"
10. **If one person/ vender is being paid for multiple receipts/payments, but all fall under the same payment, you can add more Items to your general request form by returning to step 6.**
 - a. It is much easier for everyone to process one form with multiple items than multiple forms.
11. Click "Print Form for Selected Item" and save it as a PDF
12. Print out the PDF and **TAPE** all the proper documentation to a **separate piece of paper** and hand in to the bin in the Romper Room. **PAPERCLIP** all of the required documentation together
 - a. Forms will not be processed if:
 - i. Staples are present
 - ii. The required documentation is missing
13. You can check on the status of your requests by looking at SUMS.