HOW TO ENTER A FINANCE REQUEST
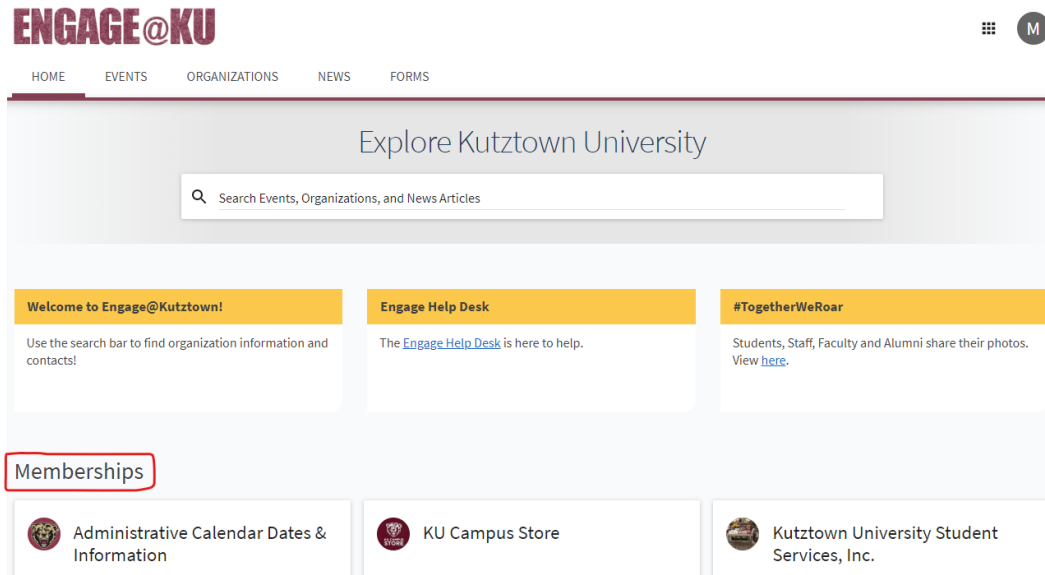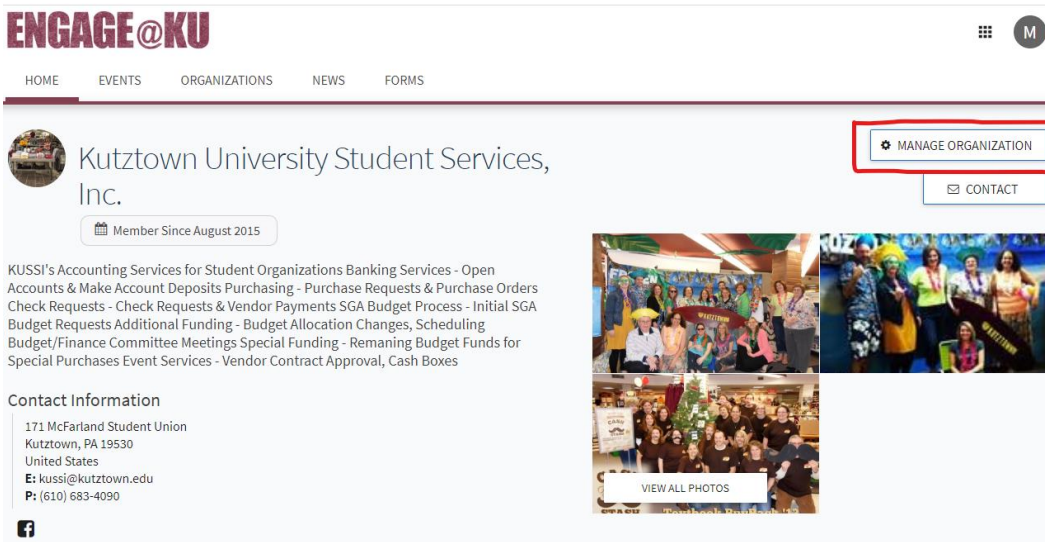## STAFF/FACULTY ADVISOR

Navigate to your organization's portal:
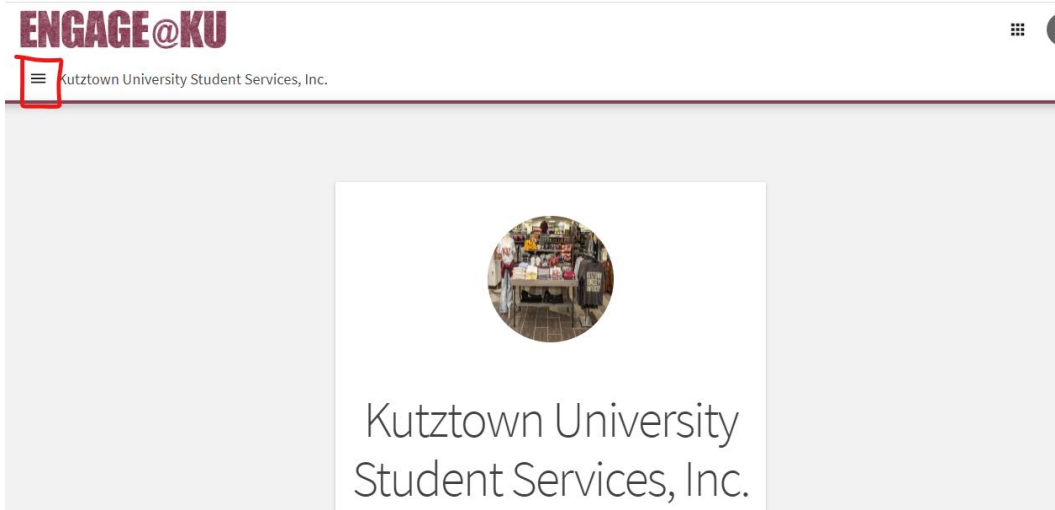
1. Log into Engage through https://engage.kutztown.edu/
2. Under the "Membership" section, choose the organization that you would like to submit a request for.
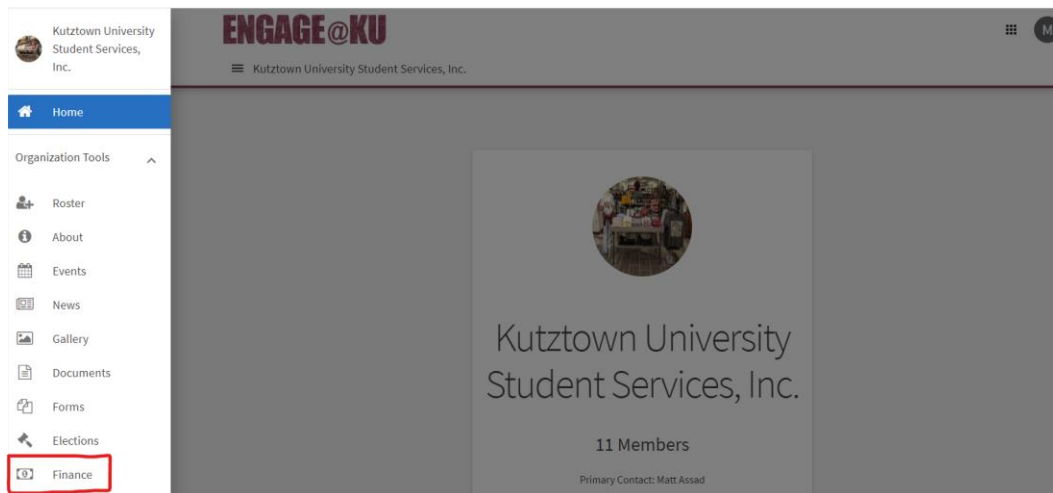

3. Click "Manage Organization."

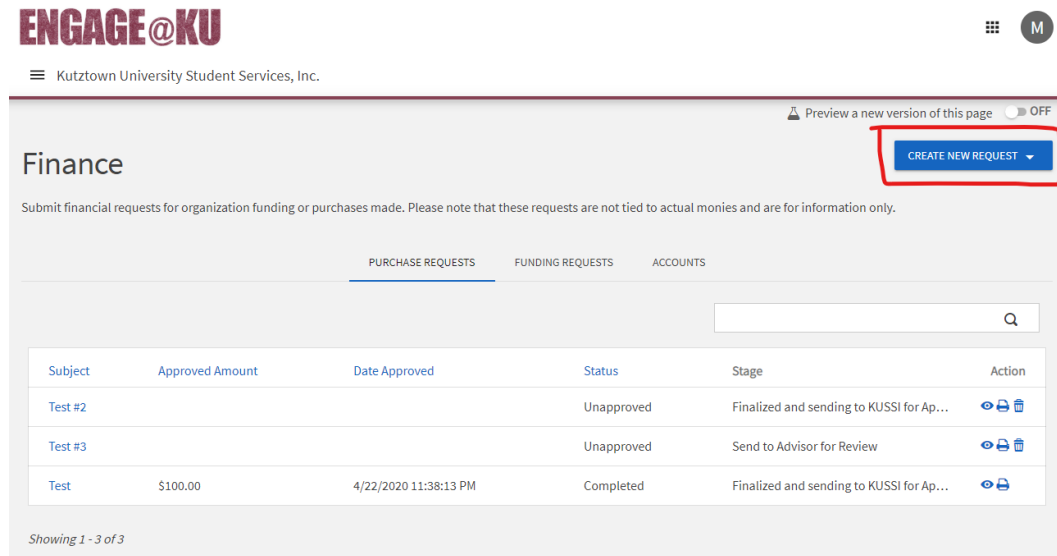4. Click on the sandwich icon next to your organization's name.

5. Choose "Finance" from the sidebar.

Viewing and Submitting requests through your finance page:

6. This will be your new page for all of your finance requests. You will have the ability to submit a new request from this page, view your previously submitted requests, and view your account information.

7. Select "Create New Request" to submit a request to KUSSI.

8. Choose "Purchase Request" if you would like to request a Purchase Order be created.

9. Choose "Funding Request" if you would like to make a direct payment to a vendor, or reimburse someone for expenses.

10. Complete the information being requested, and click "submit request" once you are finished.

11. You will receive an email notification that your request has been submitted. You will be able to view the status of the request by clicking "View Purchase Request."

Your finance purchase request was submitted successfully.

Your purchase request, Testing Purchase Request, will be reviewed and you will receive a message once it has been processed.

View Purchase Request

You are receiving this email because you are a member of ENGAGE@KU.
Manage your **email preferences**.
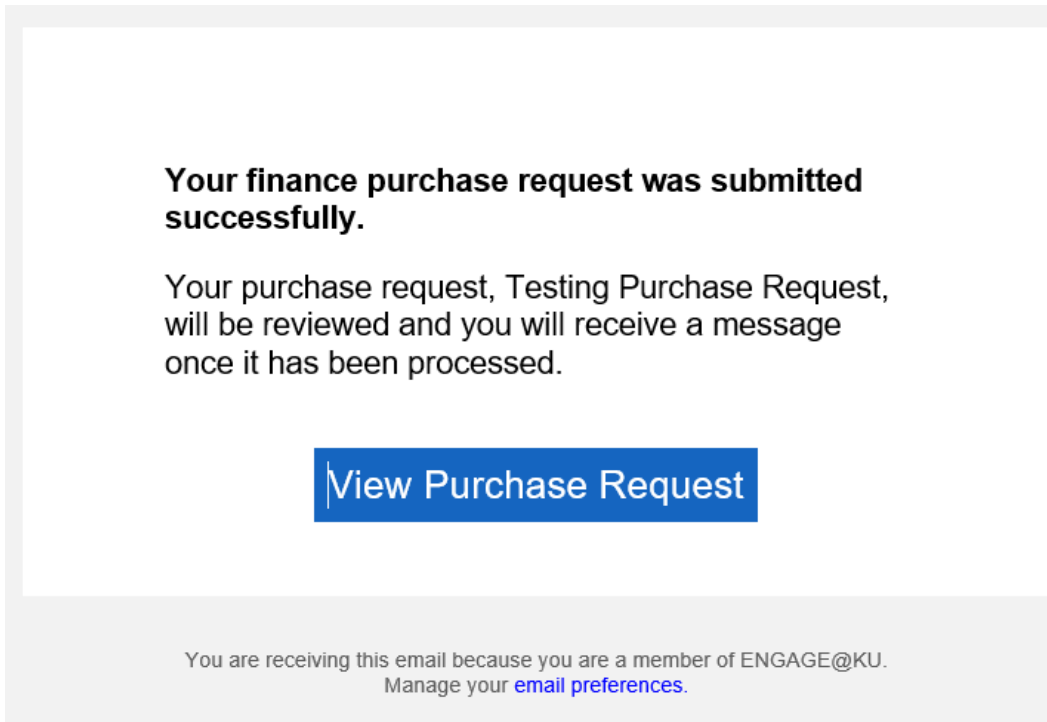
12. Since the request was not submitted by a student, there is an extra step that you (the advisor) must take. You will still need to approve of the request, as if a student submitted it. Click "View Purchase Request".

13. Once you on viewing the request, click "Change Stage".

ENGAGE@KU

≡ Sandbox 2

← BACK TO PURCHASE REQUESTS

Purchase Request: 000020

CHANGE STAGE

Organization:	Sandbox 2
Contact:	Matt Assad
Subject:	Testing Purchase Request
Account:	Budget - Test
Category:	Other
Description:	Testing Purchase Request

Payee Information

Name: Matt Assad
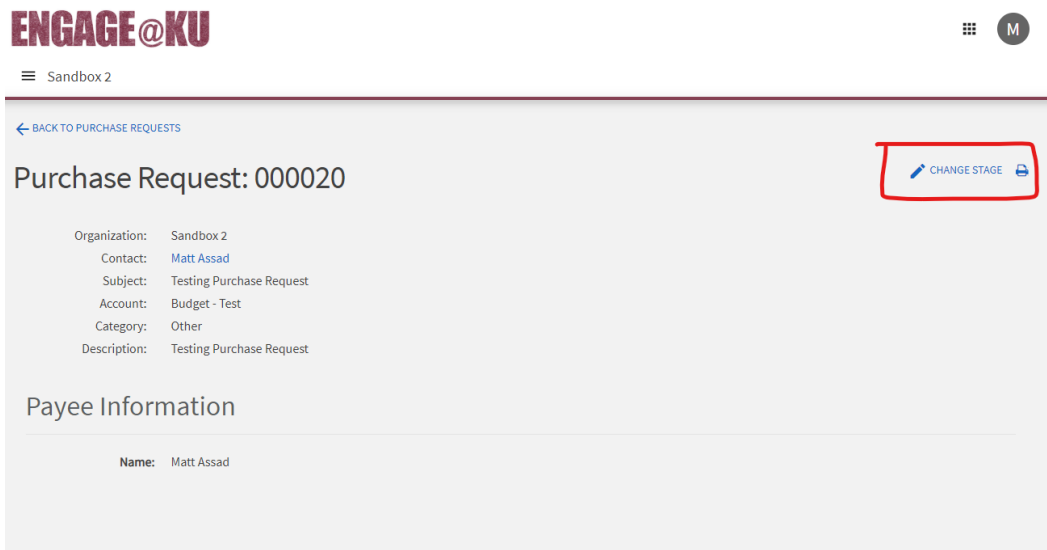
14. Click on the Stage icon, which currently says "Send to Advisor for Review".
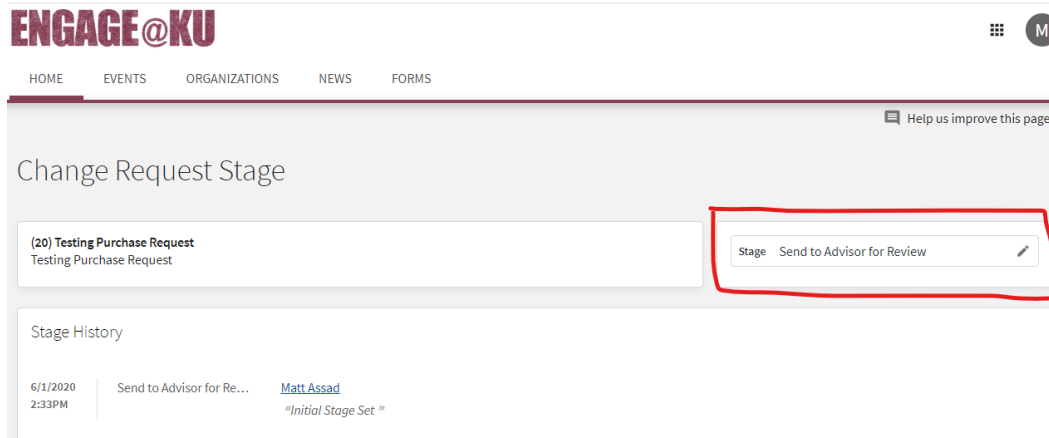
15. You will now want to assign the request to a student officer by selecting "Send to Officer for review (Only needed if Advisor is submitting request). This is required because the request was submitted by the advisor, and not the student. If the request is sent directly to KUSSI, without receiving student officer approval, it will be denied.
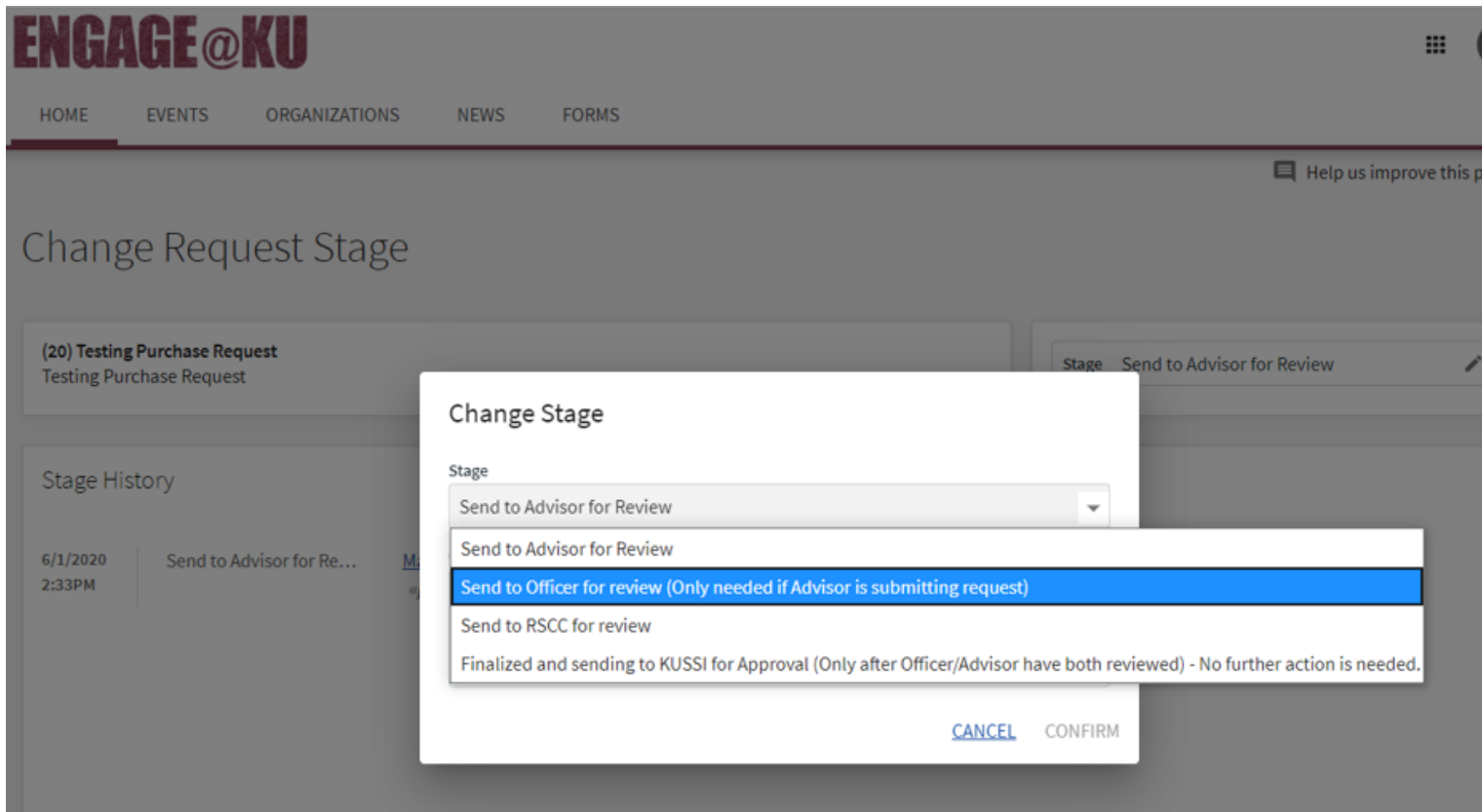
After your request has been submitted:

16. The student president and student treasurer, as listed in Engage, will be notified that a request was submitted, and they must review.
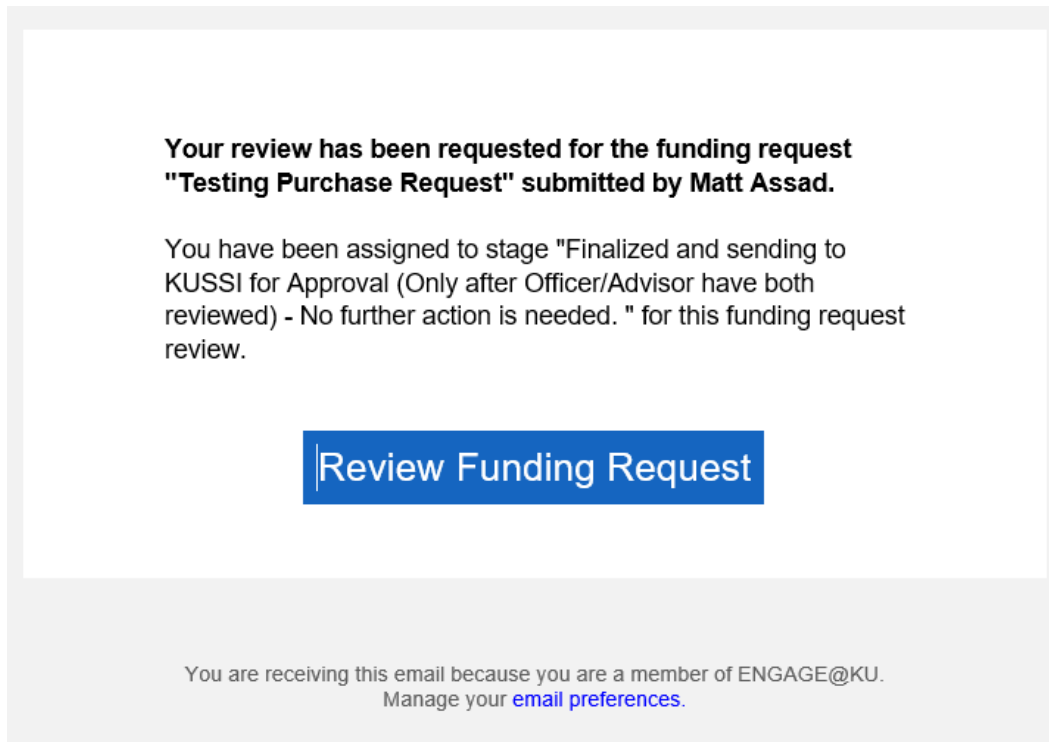   a. They MUST review and approve the request before it can be accepted by KUSSI.
17. Once the student officer approves the request, you will receive an email. No further action is needed once it has been submitted to KUSSI.

Your review has been requested for the funding request "Testing Purchase Request" submitted by Matt Assad.

You have been assigned to stage "Finalized and sending to KUSSI for Approval (Only after Officer/Advisor have both reviewed) - No further action is needed. " for this funding request review.

Review Funding Request

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Manage your email preferences.

18. KUSSI will then review your request. Once it's been approved, you will receive one last email notification. This will confirm that the request has been approved by KUSSI. Any requests are not finalized until you receive this email.

Your Purchase Request for Testing Purchase Request was Approved by Matt Assad

View Purchase Request

You are receiving this email because you are a member of ENGAGE@KU.
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