

## LAW SCHOOL STUDENT ORGANIZATION EVENT PLANNING GUIDE

The following guidelines and rules are intended to help give you a timeline for planning an event and a centralized place where you can find university and law school procedures and policies governing events.

<p><b>Select Venue and Date for Event:</b></p> <p>6+ weeks prior to event</p> <p>(4+ months for major events)</p>	<p>Select a venue and caterer and arrange for completion of required paperwork by Venue/Caterer: W-9, Contract and/or Invoice, and Alcohol Addendum. Students do not sign these documents!</p> <p>If event will be at the law school, reserve a room through the Intranet by selecting Reserve a Room under the “Resources” drop-down menu. Use your Tulane log-in information and follow the prompts. Review conflicting events before confirming date. When making room reservations, please keep in mind:</p> <ul style="list-style-type: none"> <li>• Fire Code regulations prohibit us from exceeding the seating capacity for classroom and other common areas; please reserve overflow space if needed.</li> <li>• Food service is only allowed in the Multipurpose Room, the Faculty and Student Lounges, and Rooms 110, 212, and 214.</li> <li>• Weekend events will require special access to Weinmann Hall, plus additional set-up/take-down service if catered. This will result in overtime charges.</li> <li>• Furniture may not be removed from any room. If furniture needs to be rearranged for an event, contact the mailroom at least 24 hours in advance of the function.</li> <li>• Except for approved functions, students are not allowed to use the MPR kitchen.</li> </ul> <p>For major events (the Summit, a Symposium, major speakers, etc.), confirm a date for the event with the Dean’s assistant (<a href="mailto:lawdean@tulane.edu">lawdean@tulane.edu</a>) to avoid conflicts with other academic events. <b>Major events should be confirmed 4 months in advance.</b></p>
<p><b>Completion of Advance Paperwork:</b></p> <p>4-5 weeks prior to event</p>	<p>Arrange for caterer and/or venue to complete required paperwork: Invoice or contract, W-9, and Alcohol Addendum (if alcohol will be served).</p> <p>Submit completed Law School Event Form to <a href="mailto:agaunt1@tulane.edu">agaunt1@tulane.edu</a> and <a href="mailto:mjacks8@tulane.edu">mjacks8@tulane.edu</a> 4+ weeks before event. Credit card use will not be authorized unless the form and accompanying documents are submitted at least 3 weeks before the event.</p> <p>If paying for travel for outside speaker, schedule an appointment with Dean Gaunt at <a href="http://Calendly.com/abigailgaunt">Calendly.com/abigailgaunt</a>.</p>
<p><b>Comply with Alcohol Policy</b></p> <p>4-5 weeks prior to event</p>	<p>All events with alcohol must comply with Tulane’s Alcohol Policy (<a href="http://tulane.edu/health/alcohol/upload/Alcohol-Policy.pdf">http://tulane.edu/health/alcohol/upload/Alcohol-Policy.pdf</a>):</p> <ul style="list-style-type: none"> <li>• Events with alcohol must be registered on Wave Sync 3+ weeks in advance.</li> <li>• If you intend to use the Law School’s credit card, a Law School Event Form must be submitted 3+ weeks in advance of event.</li> <li>• Alcohol must be served by a third-party vendor (licensed bartender, cannot be student);</li> <li>• Identify sufficient number of sober event monitors (1/50 students PLUS door monitor);</li> <li>• Completion of Alcohol Addendum for 2019-2020 plus contract/invoice and W-9;</li> <li>• Alcohol must comply with Exclusive Beverage Alcohol Vendor Agreement.             <ul style="list-style-type: none"> <li>○ <a href="http://www.sazerac.com">www.sazerac.com</a> and <a href="http://www.crescentcrown.com">www.crescentcrown.com</a></li> </ul> </li> <li>• Ensure security will be present:             <ul style="list-style-type: none"> <li>○ Confirm off-campus venue will provide security.</li> <li>○ If alcohol is to be served at an on-campus event, arrange for a TUPD officer to be present via <a href="https://publicsafety.tulane.edu/police/special-events-request">https://publicsafety.tulane.edu/police/special-events-request</a>. You should then complete an Interdepartmental Transfer (IT) on Wave Sync—Forms. Make sure to include the date, time, and name of event, and the appropriate student organization account.</li> </ul> </li> </ul> <p><b>Events with alcohol will not be approved and law school credit card use will not be authorized unless all requirements are met.</b></p> <p><b>Banquet Planners must attend meeting with Dean Gaunt in January 2020.</b></p>

<p><b>Expenses</b></p> <p>3+ weeks prior to event</p>	<p>After event is approved in Wave Sync and if applicable, email <a href="mailto:mjacks8@tulane.edu">mjacks8@tulane.edu</a> to request deposit be made on Tulane Law School credit card as soon as event is approved in Wave Sync.</p> <p>Submit a “Request for Payment” form on Wave Sync 3+ weeks before the event. Be sure to include the completed invoice or contract (signed by Student Affairs and uploaded to Wave Sync). Cannot be submitted until after event is approved on Wave Sync and contract is completed.</p> <p>Request free coca-cola: under WaveSync-Forms.</p>
<p><b>Publicity:</b></p> <p>2 weeks prior to event (4 weeks for major events)</p>	<p>Publicity materials must reflect a responsible attitude toward alcohol and must follow the provisions of Tulane’s Alcohol Policy.</p> <p><i>Internal communications:</i></p> <ul style="list-style-type: none"> <li>• Prepare a horizontal jpg or powerpoint slide for display on building monitors and send to Alina Hernandez (<a href="mailto:lawhelpdesk@tulane.edu">lawhelpdesk@tulane.edu</a>) 2+ business days before the event. 24+, no more than 100 words. Identify sponsoring organization and contact person. Identify duration of posting and the monitors on which you would like it to appear in email.</li> <li>• Notify <a href="mailto:SBACommunications@tulane.edu">SBACommunications@tulane.edu</a> by Friday, 5pm, before the event. Include details and brief description and specify intended audience if not open to all.</li> <li>• Notify Alina Hernandez (<a href="mailto:ahernandez4@tulane.edu">ahernandez4@tulane.edu</a>) if news coverage is sought.</li> <li>• If filming will take place, inform the Public Relations office (<a href="mailto:pr@tulane.edu">pr@tulane.edu</a>)</li> <li>• Except for InStallments, hardcopy signs may be posted <b>only</b> on lobby easels and in classrooms on designated boards. No postings are allowed on doors, in hallways, stairwells, elevators or elsewhere in the building. To reserve a table or Easel, email <a href="mailto:cwashington@tulane.edu">cwashington@tulane.edu</a> with (1) Contact Name, Phone Number and Organization, (2) Purpose, and (3) Event start and end time/date.</li> </ul> <p><i>External communications</i> (e.g., e-mails, mailings, flyers, brochures):</p> <ul style="list-style-type: none"> <li>• Use TU-branded templates to prepare materials.</li> <li>• Provide editable file of materials to Alina Hernandez (<a href="mailto:ahernandez4@tulane.edu">ahernandez4@tulane.edu</a>) for review before public dissemination</li> <li>• Provide final copy of materials to Victoria Breyer (<a href="mailto:vbreyer@tulane.edu">vbreyer@tulane.edu</a>) for electronic or physical distribution to alumni e-mail lists</li> <li>• 5 Things To Know Submission Form: Wave Sync--Forms</li> </ul>
<p><b>Logistics:</b></p> <p>2 weeks prior</p>	<p>Obtain WiFi guest access codes from the Law Help Desk (<a href="mailto:lawhelpdesk@tulane.edu">lawhelpdesk@tulane.edu</a>)</p> <p>Advise Patrick Dunn (<a href="mailto:pdunn@tulane.edu">pdunn@tulane.edu</a>) of any room setup or A/V requests</p> <p>Contact Campus Services (<a href="https://campusservices.tulane.edu">https://campusservices.tulane.edu</a>) for security/day of parking and shuttles</p> <p>Prepare any instructions and required paperwork for distribution to guests (e.g., tax forms for reimbursement of additional expenses, consent to A/V recording). Contact the International Accounting Office for paperwork for international visitors.</p> <p>Arrange for supplies, gifts and other items according to headcount—See Morgan or put in a request for reimbursement.</p>
<p><b>Day of Event</b></p>	<p>If you order food from a caterer or restaurant, you must be present to receive the food.</p> <p>Make sure to pass around a sign-in sheet.</p> <p>Clean the room after your event. Trash should be bagged and placed in the hallway outside of the mailroom on the first floor.</p>
<p><b>Expense Reports:</b></p> <p>Within 10 days of event</p>	<p>If the law school credit card was used, submit itemized receipts and sign-in sheet to <a href="mailto:mjacks8@tulane.edu">mjacks8@tulane.edu</a></p> <p>Submit requests for reimbursements using the process on the “Requests for Payment and Reimbursement Guidelines” document—original and 1 copy to Room 261 within 30 days of expense.</p>

# Law School Student Organization Event Form



This form must be used whenever a Law Student Organization requests use of the Law School's credit card. This includes all requests for payment by Law School credit card (**except for student travel and requests for reimbursement**) regardless of the nature of the event (on and off-campus, alcohol or no alcohol, etc.). Submit an electronic version of this completed form with supporting documents to [agaunt1@tulane.edu](mailto:agaunt1@tulane.edu), [mjacks8@tulane.edu](mailto:mjacks8@tulane.edu), and [imanoff@tulane.edu](mailto:imanoff@tulane.edu) no later than THREE weeks before the event. Any invoices, contracts, W-9s, invitation/agenda, invitee list, or alcohol addendum must be attached at the time of submission and event must be submitted on WaveSync at the time of submission. If this form and required documentation is not submitted 3 weeks in advance of the event, use of the corporate card will not be permitted.

## CONTACT INFORMATION (This is the point person who is responsible for collecting all documentation needed for payment)

Name \_\_\_\_\_  
Phone \_\_\_\_\_ E-mail \_\_\_\_\_  
Organization(s) \_\_\_\_\_

## EVENT INFORMATION

Event Name \_\_\_\_\_  
Description of Event \_\_\_\_\_  
Date of Event \_\_\_\_\_ Event Location \_\_\_\_\_

Is the event open to:

- General Public
- Invited Guests
- Tulane Community
- Members Only

### Will alcohol be served?

- No.
- Yes. See Requirements

### Requirements for events with alcohol met?

- Registered on Wave Sync
- Identify Sober Event Monitors
- 3rd Party Vendor Signed Alcohol Addendum
- Comply with Exclusive Beverage Agreement
- Ensure proper security is available.
- FOR EVENTS ON CAMPUS:  
Must order security at: <https://publicsafety.tulane.edu/special-events-request>

## EVENT EXPENSES: How will be payment(s) be made for the event?

- Law School Credit Card (for amounts above \$250)
- Request for payment submitted through Wave Sync
- Student(s) will be reimbursed (Complete Request for Reimbursement form within 48 hours after event).

## BUDGET BREAKDOWN

2-account \_\_\_\_\_ Natural Account \_\_\_\_\_  
9-account \_\_\_\_\_ Natural Account \_\_\_\_\_  
Dean of Students Account \_\_\_\_\_ Natural Account \_\_\_\_\_

## REQUIRED DOCUMENTS

- Attach invoices/contracts (contracts must be submitted on wavesync)
- List of Invitees and Invitation/Agenda
- Alcohol Addendum (when applicable)
- Attach W-9 (for payments to individuals who are not students): <http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3>

## SUBMIT WITHIN 48 HOURS AFTER EVENT: Submit to [mjacks8@tulane.edu](mailto:mjacks8@tulane.edu)

- Itemized Receipts
- Sign-In Sheet

### FOR APPROVAL ONLY

Dean of Students \_\_\_\_\_ SBA Finance Chair \_\_\_\_\_

Tulane University



# 2019-2020 ALCOHOL ADDENDUM

\_\_\_\_\_ **venue** \_\_\_\_\_ agrees to abide by all city and state laws regarding the serving and sale of alcohol, and to indemnify and hold harmless the Administrators of the Tulane Educational Fund ("Tulane"), it's officers, directors, administrators and employees from and against all liability arising out of or in any way connected to the serving and/or sale of alcoholic beverages at any and all events that are sponsored by a Tulane Student Organization occurring at the venue identified herein at any time between July 1, 2019 and June 30, 2020.

## For The Administrators of the Tulane Educational Fund:

By: \_\_\_\_\_  
(students do not sign here)  
Print Name: \_\_\_\_\_  
Address: Tulane University, Suite G03, Lavin-Bernick Center  
New Orleans, Louisiana 70118-5698  
Phone: (504) 314-2188

## For Venue:

Entity Name (if applicable): \_\_\_\_\_  
Signed: \_\_\_\_\_  
Printed Name: \_\_\_\_\_  
Title (if applicable): \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_

<p style="text-align: center;"><b>For Office Use Only</b></p> <p>Date of Submission: _____</p> <p>Submitted By: _____</p>
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### SUMMARY OF TULANE ALCOHOL BEVERAGE POLICY

- One Sober Event Monitor for every 50 guests is required (Sober Event Monitors must be 21 years of age or older).
- All hosts or sponsoring organizations must provide sufficient quantities of food throughout the event and free and unlimited amounts of one or more nonalcoholic beverages (ex. soda, water, juice).
- Fraternities and Sororities cannot pay for alcohol with organizational monies. There should be no drink specials or open bar requests for events. Guests are required to pay for their own drinks.
- All hosts or sponsoring organizations must take steps to assure the safety of attendees, including the provision of adequate security.

### TULANE UNIVERSITY CONTACTS

For **fraternity and sorority events**, contact Liz Schafer: [lschafer@tulane.edu](mailto:lschafer@tulane.edu), (504) 247-1531.  
For **other events**, contact Greg Feiling: [gfeiling@tulane.edu](mailto:gfeiling@tulane.edu), (504) 314-2918.

# LAW SCHOOL STUDENT ORGANIZATION REQUEST FOR ENTERTAINMENT REIMBURSEMENT

Note: Requests must be submitted within 30 days of the event. Requests submitted after 30 days must include an Exception Form.

1. Complete form. All spaces must be filled.
2. Attach documentation:
  - a. original, itemized receipts showing proof of payment
  - b. attendee list
  - c. invitation, announcement, or meeting agenda (depending on event)
3. Submit original plus 1 copy of all documents.
4. Submit forms to SBA Finance Chair in mailbox outside of Room 261.

Check disposition instructions:

- |   |
|---|
| <input type="checkbox"/> Hold for pickup in SOC |
| <input type="checkbox"/> Mail to recipient      |

If there are multiple students being reimbursed for a single event, all requests must be submitted together in one stapled packet and each request must follow all of the requirements listed above. If an event form was required for your event, please include the completed form with this packet.

Date \_\_\_\_\_

Organization \_\_\_\_\_

Amount to be Reimbursed \_\_\_\_\_

1st Account & Natural Account \_\_\_\_\_ / \_\_\_\_\_ Amount \_\_\_\_\_

2nd Account & Natural Account \_\_\_\_\_ / \_\_\_\_\_ Amount \_\_\_\_\_

Balance in 9-Account (if using 9-account):

## FOR REIMBURSEMENT

Person to be Reimbursed \_\_\_\_\_

TU ID # \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

## NAME OF EVENT, DATE, LOCATION AND DESCRIPTION OF EXPENSE

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Requested by \_\_\_\_\_  
Name Phone Number Email

Approved by \_\_\_\_\_ **Org 9-Account Verified:**  
SBA Finance Chair signature

Approved by \_\_\_\_\_  
Student Organization Advisor signature


For Office Use Only		
Processed by _____	Date _____	Number _____

# Register Your Student Organization Event

Through WaveSync you are able to manage your organization's calendar, create and share events with members, and promote events campus-wide.

1. From the WaveSync homepage, click on your organization under "Memberships" then click the "Manage Organization" link on the top right section of the page. Once you are in your organization's Action Center, click the hamburger icon next to your organization's name, this will display your organization's Action Center Home.
2. Click "Events".
3. Click the blue "+ Create Event" button to start the event registration process.
4. Enter as much detailed information about your event as you can. This will help attendees know as much about the event as possible when they are viewing events. You will need to select Theme, category and "Show To" options for your event on the first page.
5. You can add a location map to your event under the blue "Add Location" button on the first event registration page.
6. You are able to select "Perks" for your event including "Free Food" and "Free Stuff". Students will be able to search for events based on these perks and know what to expect when they attend your event!
7. Please remember that all events are subject to event registration policies.

**For additional information go to the WaveSync how-to guide at this link <https://lbc.tulane.edu/node/4226>**

	<b>Tulane University</b> <b>Sales Tax Exemption Certificate</b> <i>Acts 1884, No. 43</i>
	Louisiana Department of Revenue Special Programs Division P. O. Box 66362 Baton Rouge, LA 70896-6362 Questions about the use of this certificate should be sent to Sales.Inquiries@LA.GOV

PLEASE PRINT OR TYPE.

University <b>TULANE UNIVERSITY</b>	Issuance Date (mm/dd/yyyy) <b>07/01/2017</b>	Expiration Date (mm/dd/yyyy) <b>06/30/2018</b>
Address <b>6823 ST. CHARLES AVENUE</b>		
City <b>NEW ORLEANS</b>	State <b>LA</b>	ZIP <b>70118</b>

This certifies the above named university as exempt from all state, parochial, and municipal taxation. It extends to sales and use taxes imposed by the State of Louisiana or any of its political subdivisions on the purchase, lease, and rental of tangible personal property.

This certificate may be reproduced and copies thereof presented to vendors to claim the exemption from Louisiana state sales and use tax, until notified in writing that this exemption has been suspended, repealed or revoked. Any misuse of this exemption certificate will subject the buyer or seller to payment of the tax and all civil or criminal penalties provided for by Title 47 of the Louisiana Revised Statutes.

Authorization	
Name <i>Doug Harrell</i>	Date (mm/dd/yyyy) <i>7/3/17</i>
Signature <i>Doug Harrell</i>	Title <i>U.P. Finance / Controller</i>

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# NATURAL ACCOUNTS / EXPENSE AND REVENUE

## Expense Natural Accounts

### SALARIES AND BENEFITS

- 5331 Salaries—Hourly Staff
- 5411 Salaries—Students
- 5412 Salaries—Work Study Students
- 5861 Benefits—Students
- 5867 Benefits—Staff

### COMMUNICATIONS

- 6114 Phone Charges—Long Distance—Telecommunications
- 6132 Cellular and Beeper Service

### SUPPLIES AND OPERATING EXPENSES

- 6141 Postage
- 6211 Operating Supplies
- 6212 Office Supplies
- 6221 Dues and Memberships
- 6222 Advertising
- 6224 Books and Subscriptions
- 6226 Licensing Fees

### COPYING, PRINTING AND PUBLICATIONS

- 6231 Printing—Reports, Brochures, Journals
- 6233 Illustration Services/Art Work
- 6235 TV and Audio Visual Services
- 6241 Photocopy Machine—Supplies
- 6242 Photocopy Machine—Other
- 6243 Copying

### COMPUTER EXPENSES

- 6351 Computer Licensing Fees
- 6357 Software Maintenance Expenses
- 6358 Hardware Maintenance Expenses

### PROFESSIONAL AND CONSULTING

- 671G Guest Speaker or Artists
- 6712 Attorneys Fees
- 6713 Other Professional and Consulting Fees
- 6722 Independent Contractor—Business Associate
- 6723 Royalties

### RENTALS

- 6811 Rental—Audio Visual
- 6812 Rentals—Real Estate
- 6815 Rentals—Equipment
- 6816 Rentals—Other

### MAINTENANCE SERVICE CONTRACTS

- 6821 Photocopy Machines
- 6822 Office Equipment

### REPAIRS AND MAINTENANCE

- 7121 Routine Maintenance
- 7123 Repairs—Fixed Equipment
- 7124 Moveable Equipment
- 7125 Vehicle Repair and Maintenance
- 7132 Vehicle Fuel

### OTHER

- 7461 Temporary Labor Agents
- 7511 Minor Equipment—under \$2500
- 7512 Minor Equipment—Computers
- 7522 Local Meal—Campus
- 7543 Entertainment (students)
- 7842 Prizes and Awards
- 7851 Other

### TRAVEL

- 753A Conference Registration Fees
- 7531 Employee Vehicles—Parking, Tolls
- 7532 Domestic Transportation
- 7534 Foreign Transportation
- 7536 Domestic Lodging, Meals, Other Expenses
- 7538 Foreign Lodging, Meals, Other Expenses
- 7542 Visiting Professionals

### EQUIPMENT—OVER \$2500

- 8221 Office Equipment
- 8222 Furniture and Fixtures
- 8223 Computer Equipment
- 8226 Communications Equipment
- 8227 Transportation Equipment
- 8229 Athletic Equipment

### RECHARGE (CAMPUS ONLY)

- 8812 Student Media (Services)
- 8813 Facilities Services (Labor)
- 8815 Keys
- 8831 Phone Service—Annual Charge
- 8832 Phone Service—Move, Add or Change
- 8847 Security
- 8861 Computers/Computer-Related Services
- 8866 Parking Services

## Revenue Natural Accounts

- 4121 Undergraduate Activity Fees
- 4122 Graduate Activity Fees
- 4125 Non-Tuition Related Fees
  
- 4311 Donations—Individual (Gift Accounting Only)
- 4312 Donations—Corporate (Gift Accounting Only)
- 4313 Donations—Foundations (Gift Accounting Only)
- 4314 Donations—Other (Gift Accounting Only)
  
- 4413 Advertising—Campus, Local and National
- 4432 Fines
- 4441 Membership Dues
- 4494 Other Revenues



# Tulane

## Missing Receipt Affidavit

(for use with purchasing card or travel expense transactions)

I, \_\_\_\_\_, have either not received, or have misplaced a receipt totaling \_\_\_\_\_.  
This expense was incurred on behalf of Tulane University.

This form is submitted in lieu of the original receipt.

Reference Number: \_\_\_\_\_  
(for purchasing card transaction)

Transaction Date: \_\_\_\_\_

Vendor: \_\_\_\_\_

Detail of Expense  
(type in box below)

**Amount**

\_\_\_\_\_

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I certify that the amounts shown above were expended for Tulane University business purposes. If charged to a grant or contract, I certify that the claimed expenses comply with the conditions of the grant or contract.

\_\_\_\_\_  
Cardholder/Traveler Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Department Administrator/Chair for  
Purchasing Card, or Authorized Signer for Travel

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name of Department Administrator/Chair  
For Purchasing Card, or Authorized Signer for Travel

**TULANE UNIVERSITY**  
**TIMELINESS OF SUBMISSION**  
**EXPENSE EXCEPTION FORM**

**UNIVERSITY POLICY:**

- A) **Employee/Traveler** - The University conducts an “accountable plan” for purposes of reimbursing its employees. The IRS accepts the University’s plan as long as certain conditions are met. One critical condition is timeliness of accounting. The accounting is complete when the report is submitted and the approval process is complete. Policy indicates that reports will be timely if submitted by the employee within 45 days and no longer than 60 days of the expenditure date or last expenditure date for a trip of multiple day duration. If submitted over 45 days the report requires that an Expense Exception Form be completed and attached detailing the reason for late submission. This policy applies to out of pocket expenses as well as T&E card expenses. Penalties for late submission can be denial of out of pocket expense reimbursement or expenses can be reported as taxable wages. Continued non-compliance of the timeliness of submission policy for T&E cardholders could result in the suspension and or cancellation of the T&E card.
- B) **Employee/Departmental T&E cardholder** – Departmental T&E card transactions are subject to the same penalties as stated in point A above. Departmental T&E cardholders should be submitting a departmental expense report on a monthly basis. Advance airfare and hotel T&E card transactions should be assigned to a report for the month the airfare or hotel will be used and not submitted until the end of that future month. If the T&E departmental cardholder submits the monthly expense report over 45 days but no longer than 60 days past the end of the month that the report was due an Expense Exception Form must be completed and attached to the expense report detailing the reason for late submission. Continued non-compliance of the timeliness of submission policy for T&E cardholders could result in the suspension and or cancellation of the T&E card.

I spent out of pocket funds and or incurred T&E credit charges on behalf of Tulane University but did not file my expense report timely for the following reason(s):

Signed by employee \_\_\_\_\_ Dated \_\_\_\_\_