Student Organizations
Off Campus Event & Travel Packet
Updated January 2016

Includes:
Pre-Event/Trip Planning Guide
Detailed Instructions for Completing the TA
Sample TA Packet
Post-Event/Trip Planning Guide
Pre-Event/Trip Planning Guide

Submit an Event Request: You must complete this online form at least 2 weeks prior to your event. You will receive an email confirming approval or denial of your event. If a university van is required for your travel, you must request this in the Event Request form. Please note, a TA must be submitted for a van request can be processed. Any drivers for the state vehicles must also complete safe driver training and submit the safe driver contract.

Complete a Travel Authorization: A TA (Travel Authorization Form) is required by all student organizations when traveling as an organization activity, whether it is in state or out of state, even if there are no expenses incurred. When a student organization is going out of state or when staying overnight on an in state trip, an advisor must accompany the group. Please note, Student Activities maintains a list of faculty/staff members who are willing to chaperone off-campus trips in the event that the organization’s advisor is unable to attend.

Attached to the form, there must be a roster of all the individuals traveling and itineraries and/or schedules, which provide the necessary detail for each vendor. All expenses for your travel will be paid by using the Travel Authorization (TA) and will required supporting documentation that shows the company name and dollar amount of the expense. These expenses have been broken down into specific areas below. Please attach all additional documents (if applicable) to the TA and submit to the Student Activities office at least 2 weeks in advance. If you are receiving a cash advance for your trip, the form must be submitted 2 weeks prior to the event.

Flights: All flights must be reserved through Sanditz Travel Agency (1-800-858-4456). When calling for quotes, let them know it is for Eastern business. They allow you to hold a reservation for 24 hours without actually booking the flight. Be sure to have the correct names (as it appears on state ID) as well as the date of birth for everyone traveling.
- Ensure that TA is approved before holding flight(s).
- Seats, but not pricing, can be held for up to 24 hours.
- Check other travel sites (Expedia, Kayak, etc.) before calling Sanditz to ensure you are receiving a fair price. Do not be afraid to ask for a price match if you find the flight cheaper on another travel site.
- There is an additional $31.00 agent fee per ticket.
- Sanditz can be reached at 800-858-4456.
- Bradley International Airport parking permits are available: check the box.

Hotel: If you are booking a hotel for your trip, obtain an official quote as well as a W-9 from the hotel. The university has the ability to hold rooms on the university purchasing card if you don’t feel comfortable doing so with your personal card.

Food: All money for food when traveling can either be paid by way of a check payable directly to the vendor or a check payable to the name is on the TA.

Registration: If there are registration fees associated with your trip, obtain a quote from the vendor as well as their W-9 and attach it to the Travel Authorization form.

All Other Expenses: Any other expenses that you will incur during travel can be put into the “other” portion of the Travel Authorization form.

Pick up the Travel Advance (if applicable) with Kim Roy in SABO’s Travel Office before the trip and cash the check with the Bank of America on West Main Street in Willimantic (they will cash it without charging a fee even if you do not have an account with Bank of America).
Directions for Completing the TA:

When There is No Cost for the Trip:
1. Complete an online event request through eWeb
2. Collect names of all participants. We do not need IDs.
3. Complete the TA
   Section 1: Traveler & Trip Information
   - Traveler Name = Name of Event Contact or staff advisor if the trip is going out of state.
   - Original TA = Check this box if you are submitting this TA for the first time
   - Title = Title of Student/Staff Driver
   - Official Duty Station = Leave Blank
   - Eastern/Banner ID = Eastern ID Number of Student/Staff Name Listed
   - Date of Request = Today’s date
   - Home/Duty station = Eastern
   - To = Destination Address
   - Depart Date & Hour = Date and time departing Eastern
   - Return Date & Hour = Date and time returning to Eastern
   - Currier Info = University Van, Airline Name, Bus Name, or Rail Name
   Section 2: Object and Necessity of Travel
   - In * box = Organization Name
   - In ** box = Name of Trip as it appears in Event Request
   Section 3: Type of Transportation
   - Select appropriate box for type of transportation
   - Name of Riders = “See attached roster”
   Section 4: Total Cost (Itemized)
   - Leave Blank
   Section 5: Comments Section
   - Leave Blank
4. Signatures:
   - Individual listed under traveler name signs for “Employee Signature”
   - A student organization member signs for “Requestor Treasurer”
   - Advisor signs on the “advisor” line.
5. Attach:
   - Roster of students participating.
6. Submit to Student Activities
When There is a Cost for the Trip:
1. Complete an online event request through eWeb
2. Collect names of all participants. We do not need IDs.
3. Complete the TA
   Section 1: Traveler & Trip Information
   - Traveler Name = Name of Event Contact or staff advisor if the trip is going out of state. The travel advance check will be made payable to this person.
   - Original TA = Check this box if you are submitting this TA for the first time
   - Title = Title of Student/Staff Driver
   - Official Duty Station = Eastern
   - Eastern/Banner ID = Eastern ID Number of Student/Staff Name Listed
   - Date of Request = Today’s date
   - Home/Duty station = Eastern
   - To = Destination Address
   - Depart Date & Hour = Date and time departing Eastern
   - Return Date & Hour = Date and time returning to Eastern
   - Currier Info = University Van, Airline Name, Bus Name, or Rail Name
   Section 2: Object and Necessity of Travel
   - Select either box 02 (Conference) or box 09 (Other Activities)
   - In * box = Organization Name
   - In ** box = Name of Trip as it appears in Event Request
   Section 3: Type of Transportation
   - Select appropriate box for type of transportation
   - Name of Riders = “See attached roster”
   Section 4: Total Cost (Itemized)
   - Complete appropriate expense line items and attach appropriate supporting documentation.
   - Cross out $0.00 and write total expense.
   Section 5: Comments Section
   - Banner Index = BAM Index Number
   - Account = Leave blank.
   - Amount = Total Amount Being Spent on Trip
4. Signatures:
   - Individual listed under traveler name signs for “Employee Signature”
   - A student organization member signs for “Requestor Treasurer”
   - Advisor signs on the “advisor” line.
5. Attach:
   - Minutes & Quotes ONLY if there is an expense to the trip (i.e. tickets, parking, etc.).
   - Roster of students participating.
   - W-9 for company if this is a new vendor.
6. Submit to Student Activities
CSU Travel Authorization
ECSUFRS - 30 (09/14)

Use this form for all travel
Forward after signatures to the Travel Office
Central Air Reservations: 1-800-838-4456

Traveler Name: Joe Sample

Title: Professor I

Official Duty Station: Eastern Connecticut State University

Collective Bargaining Unit: AAUP

Date Requested: 1/8/2016

Itinerary

<table>
<thead>
<tr>
<th>HOME/DUTY STATION</th>
<th>TO</th>
<th>DATE</th>
<th>HOUR</th>
<th>RETURN</th>
<th>HOUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern</td>
<td></td>
<td>8/5/2016</td>
<td>3:00pm</td>
<td></td>
<td>8/8/2016</td>
</tr>
</tbody>
</table>

Object and Necessity of Travel (Attach substantiating documents)

01 Paper Presentation
02 Conf/Workshop
03 Research
04 Recruiting (Athletics)
05 Team Travel
06 Training
07 Faculty Development
08 Unv Development
09 Other Activities *
** G Sachs Club of Eastern
** ASGA Conference

Type of Transportation

AIR | RAIL

Registration Prepared by Agency: Yes
Hotel Prepared by Agency: Yes
Bus Prepared by Agency: Yes
Travel Advance Requested: Yes

Parking Permit Requested: Yes

Voucher No.
Voucher No.
Voucher No.
Voucher No.

Total Cost (Itemize) Note: Rates for meals and lodging should not exceed those provided for in standard Travel Regulations and in Collective Bargaining Agreement.

Airfare/Rail

Taxi/Limo

Rental Car/Bus

Personal Mileage: 0.3750

Parking/Toll

Lodging (Per diem rate)

Conference Hotel

Hotel Taxi

Meals (Per diem rate)

RegISTRATION

Total Cost: $1,078.00

Comments:

Banner Index: 1111

Account: $1,078.00

Authorized Signature

Employee Signature: Tranphoto Sample

Requestor/Treas: Student Sample

Date: 01/08/16

Approved by: 

Approved by: (Dean/Dir)

Authorized by: (Agency Head)

Travel Office Approval/Date Entered by: VP Student Affairs

Date: 

Date: 

Date: 

Date: 

Date:
## Conference Fees

The 2016 "Boston Student Government Training Conference" fees listed below include the following:

- Admission to all workshops, roundtables, and presentations
- Extensive handouts
- **BREAKFAST:** A free light continental breakfast (usually coffee, juice, fruit, bagels, muffins)
- **LUNCH:** A boxed lunch (usually choice of sandwich, chips, fruit, cooke, and drink)
- A free ASGA Conferences Rocks! T-shirt for each delegate from CampusTshirts.com
- A free ASGA notepad and pen
- A 10% discount on ASGA membership for schools joining after the conference
- A 35% discount on on-campus conducting booked at the conference
- Private one-hour consultations by appointment only
- Excellent personal service and attention from the ASGA team
- Free parking at the conference location, Wheelock College's Hewes Street Building.

**Special Bonus:** Register before June 10, 2016 and receive, at no additional charge, a complimentary one-hour private consultation session with one of the senior partners of The St Consulting Group (sessions are limited, so make your appointment immediately). This is a unique opportunity to have one-on-one organizational counseling with SG experts who will offer an outside, unbiased perspective absolutely FREE of charge (normal value of $499 per hour). You must reserve your consulting appointment at the time you register by visiting consulting@asgaonline.com. Hurry—appointment times fill up fast!

### ASGA Members

<table>
<thead>
<tr>
<th>Super Early Bird</th>
<th>Early Bird</th>
<th>Regular</th>
<th>Last Chance</th>
<th>On-Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register &amp; Pay by June 10, 2016</td>
<td>Register &amp; Pay from June 11 to July 1, 2016</td>
<td>Register &amp; Pay from July 2 to July 22, 2016</td>
<td>Register &amp; Pay from July 23 to August 5, 2016</td>
<td>Register &amp; Pay at the Conference August 6, 2016</td>
</tr>
<tr>
<td>$159 per person</td>
<td>$159 per person</td>
<td>$209 per person</td>
<td>$229 per person</td>
<td>$309 per person</td>
</tr>
<tr>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
</tr>
<tr>
<td>$135 (6 to 19 delegates)</td>
<td>$159 (11 to 15)</td>
<td>$175 (11 to 15)</td>
<td>$185 (16 +)</td>
<td>$259 (11 to 15)</td>
</tr>
<tr>
<td>$125 (16 +)</td>
<td>$149 (16 +)</td>
<td>$165 (16 +)</td>
<td>$195 (16 +)</td>
<td>$259 (16 +)</td>
</tr>
</tbody>
</table>

### Non-Members of ASGA

**SAVE $100 per person by joining ASGA! See member rates above.**

<table>
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<td>Register &amp; Pay from July 23 to August 5, 2016</td>
<td>Register &amp; Pay at the Conference August 6, 2016</td>
</tr>
<tr>
<td>$269 per person</td>
<td>$289 per person</td>
<td>$309 per person</td>
<td>$329 per person</td>
<td>$409 per person</td>
</tr>
<tr>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
<td>Register More Students &amp; Save *</td>
</tr>
<tr>
<td>$239 (6 to 19 delegates)</td>
<td>$259 (11 to 15)</td>
<td>$279 (11 to 15)</td>
<td>$289 (16 +)</td>
<td>$359 (16 +)</td>
</tr>
</tbody>
</table>
Sample Conference Registration W-9 – Page 3 of Submission

Form W-9
(Rov. December 2014)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification
Give Form to the requester. Do not send to the IRS.

1. Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
American Student Government Association (ASGA)
2. Business name/disregarded entity name, if different from above

3. Check appropriate box for federal tax classification; check only one of the following seven boxes:
☐ Individual/sole proprietor
☐ C Corporation
☐ S Corporation
☐ Partnership
☐ Trust/Beneficiary
☐ Limited liability company. Enter the tax classification (e.g., corporation, S corporation, partnership)
Note: For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member entity.
☐ Other (see instructions)

4. Exemptions (check only if you are eligible; see instructions on page 3)
☐ Exempt organization code (if any)
☐ Exempt organization code (if any)
(Use to identify tax-exempt organizations incorporated outside the U.S.)

Part I Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid the backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or a disregarded entity, see the Part I instruction on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

Note: If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number

Employer identification number

Part II Certification
Under penalties of perjury, I certify that:
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because:
   (a) I am exempt from backup withholding, or
   (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding because you have failed to report all interest or dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Employer identification number

Signature of U.S. person

Organization signature

Date

01/08/2016

General Instructions
Signature of U.S. person


Purpose of Form
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN). To report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:
• Form 1099-INT (interest earned or paid)
• Form 1099-DIV (dividends, including those from stocks or mutual funds)
• Form 1099-MISC (certain types of income, prizes, awards, or gross proceeds)
• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
• Form 1099-5 (proceeds from real estate transactions)
• Form 1099-K (payment card and third party network transactions)

• Form 1099 (copies of mortgage interest), 1099-E (student loan interest), 1099-T (tuition)
• Form 1099-C (canceled debt)
• Form 1099-A (acquisition or abandonment of a security)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding,
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign persons' share of effectively connected income, and
4. Certify that FATCA code(s) entered on the form (if any) indicating that you are exempt from the FATCA reporting, is correct. See What is FATCA reporting? on page 2 for further information.

Cat. No. 10031X
Form W-9 (Rev. 12-2014)
Holiday Inn Boston-Brookline
1200 Beacon Street, Brookline, Massachusetts, 02446 United States

Aug-09-2016 to Aug-07-2016
1 Room, 1 Adult

Reserve now to ensure you get this low price. Rooms are limited.

2 DBL BEDS ON 1ST OR 2ND FLR NONSMOKING
Located on the 1st or 2nd flr of our atrium. This room with two dbl beds has an interior view of the atrium. Enjoy free WiFi, HBO, and p-pv and/or v-views on our 32" HD LCD TVs. We offer bath and body amenities in our cozy stand up showers.

From 30,000 points or $254.00 USD

2BD EXEC INTERIOR ATRIUM VIEW NONSMOKING
Relax in one of our spacious executive interiors facing inside our atrium. Finish your workday with a well lit work desk and free high speed WiFi or relax with an HBO series or pay per view movie on the 32" inch flat screen LCD TV. Unwind in our full size bathroom and bath tubs.

From $254.00 USD

STANDARD DOUBLE BEACON ST VIEW

From $257.50 USD
## W-9 Form

### Request for Taxpayer Identification Number and Certification

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</td>
<td>Holiday Inn</td>
</tr>
<tr>
<td>2. Business name/disregarded entity name, if different from above</td>
<td>Holiday Inn Boston-Brookline</td>
</tr>
<tr>
<td>3. Check appropriate box for federal tax classification; check only one of the following seven boxes:</td>
<td>![boxes and options]</td>
</tr>
<tr>
<td>Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.</td>
<td>![additional note]</td>
</tr>
<tr>
<td>4. Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</td>
<td>![exemptions]</td>
</tr>
<tr>
<td>Exempt payee code (if any) Exemption from FATCA reporting code (if any)</td>
<td>![codes and options]</td>
</tr>
<tr>
<td>A. to accounts maintained outside the U.S.</td>
<td>![additional note]</td>
</tr>
<tr>
<td>5. Address, street, city, state, and ZIP code</td>
<td>1200 Beacon Street, Brookline, MA 02446</td>
</tr>
<tr>
<td>7. List account number(s) here (optional)</td>
<td>Requester's name and address (optional)</td>
</tr>
<tr>
<td>Part I Taxpayer Identification Number (TIN)</td>
<td>![identification number section]</td>
</tr>
<tr>
<td>Social security number</td>
<td>![social security number]</td>
</tr>
<tr>
<td>or Employer identification number</td>
<td>![employer identification number]</td>
</tr>
<tr>
<td>Part II Certification</td>
<td>![certification section]</td>
</tr>
<tr>
<td>Under penalties of perjury, I certify that:</td>
<td>![signature and date]</td>
</tr>
<tr>
<td>1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and</td>
<td>![additional note]</td>
</tr>
<tr>
<td>2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and</td>
<td>![additional note]</td>
</tr>
<tr>
<td>3. I am a U.S. citizen or other U.S. person (defined below); and</td>
<td>![additional note]</td>
</tr>
<tr>
<td>4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.</td>
<td>![additional note]</td>
</tr>
<tr>
<td>Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.</td>
<td>![additional note]</td>
</tr>
</tbody>
</table>

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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 such as legislation enacted after an earlier release is available at www.irs.gov/formW9.

### Purpose of Form

An individual or entity if an W-9 requested who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amounts reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-PAT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-INT (other types of interest)
- Form 1099-B (sales of securities and other financial instruments, including Treasury bonds and similar instruments issued by governments, or real estate transactions)
- Form 1099-J (miscellaneous income)
- Form 1099-MISC (services or rents received or other income not otherwise reported on a Form 1099)
- Form 1099-R (dividends, including those from stocks or mutual funds)
- Form 1099-S (sales of securities and other financial instruments, including Treasury bonds and similar instruments issued by governments, or real estate transactions)
- Form 1099-K (miscellaneous income and third-party network transactions)

- Form 1099-K (miscellaneous income and third-party network transactions)

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**Cat. No. 10823X**

Form W-9 (Rev. 12-2016)
Cactus Club of Eastern Connecticut State University
Minutes December 1, 2015

Attendance: Advisor Joe Sample, President Sam Sample, Vice President Scott Sample, Treasurer Sophia Sample, Secretary Stephany Sample, General Members: Casey Kensey, Theresa Giard, Marci Reisman, John Wescott, Michelle Delaney, Chris Ambrosio

Called to Order at 11:04am by President Sam Sample.

Discussion:
Vice President Scott Sample discussed the updates to the Cactus Club cactus sales fundraiser. General Member Giard motioned (Motion #4) to approve to spend $200 on supplies for fundraiser, second by Marci Reisman. Motion passed unanimously.

Discussion continued on what items would need to be purchased and date/time of event. Dates will be discussed with Student Activities and a decision will be made at next week’s meeting.

Treasurer Sophia Sample motioned to spend up to $1,500 from the fundraising account to send President Sam Sample, Vice President Scott Sample and Treasurer Sophia Sample to Boston for the 2016 ASGA Conference. Motion seconded by Michelle Delaney and passed unanimously.

Meeting Adjourned at 11:54am.

Stephany Sample
Secretary Signature

Joe Sample
Advisor Signature
After the Trip:

- Complete a CO17-XP form with Kim Roy in SABO’s Travel Office.
  - List all expenses incurred (including prepaid fees).
  - Attach all original receipts.
  - Attach any air, bus, or rail ticket stubs.
  - If an advance was received, have the person who the check was made payable to fill in the amount and sign. You will be required to deposit all remaining cash from the Travel Advance and attach the deposit slip to this form.
  - Put your BAM index number of “Banner Index”
  - If additional expenses were incurred during the trip, revised minutes must be attached.
  - If another person on the trip incurred expenses and needs to be reimbursed, another CO17-XP form needs to be filled out in that person’s name and revised minutes and receipts need to be attached.

- Submit an Official Summary to BAM: An Official Summary Survey must completed after an organization goes on a trip or attends a conference that the Budget and Management Committee partially or fully funds. The purpose of this survey is for SGA to keep track of the value and information gained from all trips and conferences that BAM funds, as well as making sure that the trips are beneficial to the students that attend them.