

SOMeCA /University Form	Description of Form (When do I use this?)	Recommended Deadline	Official Deadline	Why?	Reminders:
Event Proposal (Classroom Space)	This event proposal is for events or meetings that will be held in classroom spaces only.	10 business days before	5 business days before	The classroom specialist team manages all classroom reservations for the campus. Additionally, they need enough time to ensure that our Custodial Staff is aware of events/meetings happening in the spaces.	No food and/or drinks allowed in classroom spaces.
Event Proposal (Venue)	These event proposal forms are for events or meetings that will be held in venues located within the UCSC campus colleges or units (eg. Baytree Conference Rooms, Redwood Lounge)	Small Scale: 10 business days before	5 business days before	Each venue and event requirement may differ due to insurance requirements, capacity, meal and entertainment cost, financial processing, etc. All venues are managed by a facility coordinator and have their own deadlines for venue reservation.	Discuss with your SOMeCA advisor early on when planning in-person events.
Mid Scale: 3 weeks before		2 weeks before			
Large Scale: 6 weeks before		Up to 6 weeks before			
Event Proposal (Virtual Event)	This event proposal is for events or meetings that will be held virtually only.	Small Scale: 5 business days before	2 business days before	Each event requirement may differ due to insurance requirements, capacity, meal and entertainment cost, financial processing, etc.	Discuss with your SOMeCA advisor early on when planning virtual events.
Mid Scale: 2 weeks before		2 weeks before			
Large Scale: 4 weeks before		Up to 3 weeks before			
Ledger Request	The ledger request is a student organization YTD-bank statement housed by university.	2 business days	2 business days	Requests must be emailed to SOAR@UCSC.EDU from an authorized representative @UCSC email to verify permissions.	Staff can only release ledgers to Authorized Representatives.
Payee Request (204 Form) - Business	Tax Form to authorize a business to receive funds from the University through the organization	10 business days	10 business days	This is required to make a vendor eligible to receive funds from the university.	A 204 Form must be completed prior to submitting a Purchase Request and/or Reimbursement.
Payee Request (204 Form) - Individual	Tax Form to authorize an individual to receive funds from the University through the organization	10 business days	10 business days	This is required to make a vendor eligible to receive funds from the university, as a payment or reimbursement.	A 204 Form must be completed prior to submitting a Purchase Request and/or Reimbursement.
Purchase Request Form - Services	Use this form to generate a payment agreement to a vendor for a service they will perform.	10 business days before service begins	10 business days before service begins *Up to 3 weeks for complex/high value services	Multiple offices will review the request to generate a Purchase Order that aligns with the University terms and conditions	All service requests must have a 204 Form completed prior to submission and must have a quote attached with the services proposed and the amount.
Purchase Request Form - Supplies/Food	Use this form to generate a payment agreement to a vendor for a good/food they will provide.	5 business days before supplies/goods are needed	5 business days before supplies/goods are needed	Multiple offices will review the request to generate a Purchase Order that aligns with the University terms and conditions	No food allowed indoors
Reimbursement Form	Use this form to pay back a person that purchased goods/food out of pocket. <i>Services are NOT reimbursable.</i>	2 weeks after	4 weeks after	The IRS indicated that any reimbursement past the 4 weeks will become taxable income to the recipient.	All reimbursements must have a 204 form completed prior to submission and must have original receipts attached and submitted by an authorized representative that is not the person being reimbursed.