UIWSOM STUDENT ORGANIZATION TRAINING MANUAL

UNIVERSITY OF THE INCARNATE WORD.

SCHOOL *of* OSTEOPATHIC MEDICINE

CREATED MAY 2020/UPDATED APRIL 2021

Student Affairs Contact Information for Student Organizations

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Student Affairs Main Line: 210-619-7051
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Engage Help Center: https://engagesupport.campuslabs.com/hc/en-us

How to use this manual:

This training manual is a supplemental document to the UIWSOM Student Organization Handbook. You are responsible for reviewing this entirety of this manual and the entirely of the UIWSOM Student Organization Handbook. Both documents will help guide you when making decisions and both contain vital information that will assist you in maintaining active status within the organization.

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Officer Requirements

- *From UIWSOM Student Handbook (pg. 72)*: Osteopathic medical students are encouraged to develop, organize and participate in student associations, interest groups, and government organizations. For learners interested in serving multiple leadership positions, the following rules must be followed:
    - Hold no more than 2 executive positions
    - Hold no more than 1 position that requires travel (i.e. SGA President or Vice President and SOMA President or National Liaison)
    - Hold no more than 3 leadership roles with only 1 allowed to be an executive position.

  In other words:
    - If you have 3 positions, only ONE can be executive
    - If you have 2 positions, BOTH can be executive (if you choose)
- *From UIWSOM Student Organization Handbook (pg. 72)*: Learners serving as SGA officers, club presidents, student ambassadors, UIWSOM representatives at national meetings, or in any similar position must be in good academic standing.
- *From UIWSOM Student Organization Handbook:* Appoint at least one member as UIWSOM Student Government Liaison; two liaisons are recommended. The second liaison may substitute as Alternate Liaison if the appointed member is unable to attend meetings. These members are required to attend all Senate and Town Hall meetings of UIWSOM Student Government Association and report back to the organization's leadership after each meeting.

Student Organization Officer Transition Protocol

In order to facilitate a smooth transition of leadership, the following must be done:

1. Host elections:
    a. All new officers must be fully elected by the end of April every year
    b. If you are an officer in a national/international chapter, you must also inform the parent organization of your elections based on the guidelines in their constitution and by-laws
2. The new President (or equivalent) must provide a list of new officer names and titles to Student Affairs at SOMStudentOrgs@uiwtx.edu.
    a. Student Affairs will remove the previous officers from their positions on Engage and to the officer Outlook group.
    b. All new officer rosters must be sent in no later than May 1st.
3. Training: Once new officers are elected, the previous officers are responsible for training the new ones and passing on all necessary and important documentation needed to sustain the organization. Student Affairs will host an annual "New Officer Training" in the Spring to update new officers on policies and procedures outlined in this manual and to answer any questions they may have. New officers must also:
4. Review the UIWSOM Student Organization Handbook and UIWSOM Student Organization Training Manual and submit acknowledgement form: https://uiw.campuslabs.com/engage/submitter/form/start/480407New officers are required to Re-Register their organizations by June 1st every year (process is outlined in the next section)
5. Treasurers only: If you did not attend the New Officer Training, you are responsible for setting up a training time with Armando Villarreal (arvilla1@uiwtx.edu) to gain access to and learn CashNet.

Organization Re-Registration

Starting May 1ˢᵗ every year, all organizations will be up for Re-Registration. The Re-Registration process is necessary to keep the organization up-to-date. It is a quick and simple process, therefore it must be completed by May 1ˢᵗ. It can be completed by the President, Vice President, or Secretary (or equivalents).

How do I re-register my organization?
1. Log in to Engage using your UIW credentials: https://uiw.campuslabs.com/engage/
2. Select your organization from "Memberships" and click "Manage Organization"
3. Review and update the following:
   a. Member roster:
      i. Add or delete members/non-members
      ii. Once dues are collected, you can optionally add those who have paid as "paid or full members"
   b. Required documents:
      i. Upload current constitution & by-laws (if it is not present in the org documents, or if there were any recent changes)
      ii. Upload the current state, national or international chapter constitution and by-laws (if applicable)

Once you have completed the review and update of the above, your organization is covered until the next Re-Registration period the following year.

Risk Management Training

The UIWSOM Risk Management Program requires the president and all organization advisors of each student organization to complete the training and submit necessary paperwork. However, the training is open to all students and is strongly recommended to all officers of all Registered Student Organizations (RSOs). The information provided in this mandatory training ensures that organizations plan and host safe events that all students may enjoy, as well as, to inform them of the potential risks involved in organization activities, forms utilized to submit for proposed events and their potential and/or perceived level of risk, and how to take proactive steps to minimize accidents. Student Affairs reserves the right to request a written Risk Management plan for and to decline and/or change any event to ensure the safety of all students and the community.

Deadline*: Risk Management Training for all new officers must be completed <u>one month</u> after they are elected, or sooner if the new officers are planning on hosting an event after they step into office. This is because an organization is prohibited from hosting ANY events (except for general meetings) until this training is completed. Risk Management Training for all organizations is due by June 1ˢᵗ.

Risk Management Training and document completion is required for:
- The president of every RSO at UIWSOM – renewed annually
- All advisor(s) for each RSO – renewed every ten (10) years

If any other officers want to participate in the training and receive credit, please include their names in the acknowledgement form.

How to complete the RMT:
- The Risk Management Training (RMT) PowerPoint for UIWSOM can be accessed at the following link:
  - https://studentuiwtx.sharepoint.com/:f:/s/SOMOrgOfficers/EjF0cp85mXpMnZutwSUSvsEBwEdOM8oA6Sd04oeZrDRk0Q?e=fpMaTZ
- The Risk Management Acknowledgement MUST be completed in order to receive compliance for your organization
  - https://uiw.campuslabs.com/engage/submitter/form/start/480363

- If you are asked to submit a Risk Management Plan for an event, you can access the worksheet and supplemental guide here *(you do not need to review this to complete the training):* *https://studentuiwtx.sharepoint.com/:f:/s/SOMOrgOfficers/Ep6Yd5mNk4dLiAaZWLbfVYwB2Ec1wJBDEi-tw73lOgSO1A?e=mb3WLL*

Your Organization Advisor

Each RSO is responsible for enlisting and maintaining at least one UIWSOM faculty/administrator or qualified community advisor (i.e. preceptor) to serve as their organization advisor. The advisor supports the group's activities and aids in the overall success and excellence of the organization and its members.

If you already have an advisor, be sure you have been properly introduced to them either on your own time or by the previous officers.

What is my advisor responsible for?
- Your advisor should act as your organization guide, so if you have any issues, questions or concerns you can contact your advisor with them.
- Before submitting an event request through Engage, you must gain approval from your advisor. It is best to plan events with your advisor's guidance, so try to include them in every step of the planning process.
- Advisors are also responsible for approving all financial documentation before it is submitted to Student Affairs including check requests, bank card & petty cash requests, purchase order forms, reimbursements, etc. Keep in mind that your advisor might not know your organization's financial status, so you must request your account balance using the UIWSOM Organization Fiscal Status Request form and update your advisor before requesting their signature on any financial documents.
  (Fiscal Status Request Form: https://uiw.campuslabs.com/engage/submitter/form/start/433851)
  - The advisor's signature/approval can be collected in two ways:
    - Signing the form (some forms are carbon copy and can only be signed in-person)
      OR
    - Giving approval via e-mail
      - Send your advisor an email with the following:
        - Amount to be approved
        - Reason for needing approval
      - Once they send their approval, forward that e-mail to SOMStudentOrgs@uiwtx.edu

What if my advisor cannot continue to advise my organization?

If your advisor has to step down for any reason, please have them e-mail SOMStudentOrgs@uiwtx.edu stating their intentions, and who they recommend as a replacement. The replacement must then sign a new Advisor Agreement Form and you must send it to Student Affairs at SOMStudentOrgs@uiwtx.edu.

Advisor Agreement Form:
https://studentuiwtx.sharepoint.com/:f:/s/SOMOrgOfficers/EnKayLI3iXlOiLbFIDbHpJ4BIWyms_lvgYAmE6Lx7MJc4Q?e=Z5Ux8R

What is Engage?

Engage is the platform UIW uses for event approvals, event promotion, form collection, news posts, organization communication, and more.

As an officer, you are <u>required</u> to use Engage for the following:

1. Event, fundraiser and activity approvals
2. Flyer approvals (for events, announcements, etc.)
3. Updating the organization member roster
4. Official document keeping (only constitution & by-laws are required)
5. Risk Management Training (annually)
6. Organization re-registration (annually)

Optional uses of Engage:
1. Form collection
2. News posts
3. Relay messaging (via Roster)
4. Other document keeping (i.e. posting notes from meetings, budget worksheets, etc.)
5. Creating photo galleries of events (highly recommended!)
6. Hosting elections

Event Approvals

Events (including virtual events), fundraisers, speaker events and general meetings (not including private officer meetings) must be submitted for approval through Engage.

What do I need to submit an event for approval?
1. Basic event information
2. Guest speaker information (if applicable)
3. Fundraising information (if applicable)
4. Flyers and other promotional materials (if desired)

How far in advance do I need to submit my event for approval?
- General, low-risk, on-campus or virtual event with no guests or speakers: 2-week <u>minimum</u> notice
- General, low-risk, local, off-campus event: 3-week <u>minimum</u> notice
- Event with guest speaker: 3-week <u>minimum</u> notice (due to additional guest approval process)
- Fundraising event: 4-week <u>minimum</u> notice
- Event with travel (within the U.S. – non-conference): 6-week <u>minimum</u> notice
- Event with international travel (i.e. mission trip) : 6-month <u>minimum</u> notice (cooperation/meeting with the UIW International Office is required)

How to submit an event:
At the time of event submission, you must have completed information and materials including: date(s)/time(s), guest speaker CV/resume, completed flyer or social media materials, etc.

1. Log in to Engage using your UIW credentials: https://uiw.campuslabs.com/engage/
2. Select your organization from "Memberships"
3. Click "Manage Organization"

4. From the drop-down menu, select "Events"
5. Click "+ Create Event"
6. Fill out all required information (this includes room requests, guest speaker info, fundraising info, and flyers)
7. Submit

How do I reserve a room on campus?

The room reservation process is embedded in the event approval process through Engage. You will need the following information to reserve your room:

- At least two room locations to choose from (list your preferred choice first)
- How many people you are expecting at your event

Once your event is approved, you will receive an Engage message saying your room is reserved, along with an Outlook calendar invite from OSAroomreservations@uiwtx.edu confirming your location.

If there are any issues with your room request, Student Affairs will reach out to you to select a new location. In rare cases where there are no rooms available, you will have to select a new date for your event.

How do I reserve equipment?

If you would like to request equipment for your event, you must fill out the Student Affairs (SA) Equipment Reservation Form: https://uiw.campuslabs.com/engage/submitter/form/start/280982

The following items are available for reservation:

- Card swipers (for CashNet)
- Portable screen
- Portable projector
- Portable speaker
- Portable microphones
- Popcorn machine (must purchase own popcorn packets and sleeves/cups – Rico's is recommended)
- Hot dog machine (must purchase own hot dogs, buns, dressings and serving ware)
- Snow cone machine (must purchase own ice, syrup and cups)

Filling out an equipment reservation does not guarantee the items will be available, so please ensure you plan far enough in advance to claim the items you need.

What if I need technology assistance?

If you need technology assistance, for example, setting up Zoom on a tv screen or playing a video or music, you will need to e-mail Carlos Camargo (camargo@uiwtx.edu) or Carlos Shepherd (clshephe@uiwtx.edu) for assistance. If you need to reserve equipment, you will fill out the Student Affairs (SA) Equipment Reservation Form: https://uiw.campuslabs.com/engage/submitter/form/start/280982.

Important reminders for events/fundraising:

- If you are planning a dress-down day, be sure to check that item on the event submission. The dean will be notified to approve/deny your request.
- Pets are prohibited from attending events unless they are kept outside the buildings or are approved service animals through UIWSOM.
- If you are planning a "week" or "month" of activities (i.e. Mental Health Awareness Month) you must submit each event separately as some events require separate approvals. However, if you are hosting the same, recurring event (i.e. a canned food drive lasting the entire month of November) you can submit one approval. You can also add multiple dates and times for one type of event (i.e. Wednesday Morning Run, Plarn Party).

- High risk events might require a Risk Management Plan, but Student Affairs will let you know if you need an RMP.
- If you are planning a fundraiser:
  - Apparel
    - Apparel must be approved before signing any contracts with a vendor. When uploading your apparel fundraiser in the event submission, make sure it includes a sample of what the apparel will look like <u>with</u> the artwork on it. This is <u>REQUIRED</u> by Accounts Payable.
    - Plan ahead – account for approval times, production times, and shipping times.
    - Communicate with your customers – if there is a delay in receiving items, make sure you are communicating with them.
    - If someone asks for a refund, send the refund request along with their receipt to SOMStudentOrgs@uiwtx.edu.
  - Food
    - You must display all ingredients of the items you are selling (store-bought and homemade).
    - You may NOT sell to anyone (including family and friends) outside of UIW without a City of San Antonio food permit.
  - Alcohol
    - Alcohol may never be purchased with UIW funds for an event unless it is through a company (i.e. Sodexo) with a license to purchase and sell alcohol based on TABC guidelines.
    - You may not collect fundraising funds from alcohol sales – alcohol sales as a fundraiser are strictly prohibited. So, if you are selling alcohol at an event, you may not collect any profit from alcohol sales.
    - The rule is two drinks per person at an event with alcohol, and food must be provided as well.

Change Requests

If you forgot to add details to an event, need to add or change information (date, time, location, etc.), or need to add a flyer or a new cover photo to your event, you will need to submit a change request. Note: You can only submit a change request if your event has already been approved or denied.

All edits are submitted for approval, which means edits will not immediately take effect. **Please allow 48 hours for your changes to be reviewed**. If further approval is needed based on your changes or if there are any concerns, you will be contacted by Student Affairs.

How to submit a change request:
1. Log in to Engage using your UIW credentials: https://uiw.campuslabs.com/engage/
2. Select your organization from "Memberships"
3. Click "Manage Organization"
4. From the drop-down menu, select "Events"
5. Select the event you want to make changes to
6. Click "Change Details"
7. Engage will walk you back through the whole process to make sure you have the chance to change all the details you need to change
8. Submit

What if I have not received approval/denial yet and cannot submit a change request?
If you submitted an event request and wanted to edit it before approval, you may go back into Engage and edit your submission using the following article for instructions: https://engagesupport.campuslabs.com/hc/en-us/articles/360026493611-Revise-Event-Submissions-During-Review

Flyer Approvals

All flyers/publications posted on campus or on social media on behalf of a student organization must be approved through the Engage event submission process. If anything is posted without prior approval, the student organization risks being fined.

What qualifies as a flyer/publication?
- Flyer for an event
- Flyer for promotion to join the organization
- A newsletter made with the intention to be sent to the campus

How to submit a flyer for approval:
1. Follow the instructions listed above for event submissions (the flyer approval is included in the event submission process)
2. If you want to re-submit a flyer, please follow the instructions listed above for submitting change requests
3. If you want to submit a flyer that is not connected to an event (i.e. to promote your org to entice new members to join, etc.) then email us at SOMStudentOrgs@uiwtx.edu

If you submitted your flyer to be printed, Student Affairs will print and sign it, and comment on your event submission when your signed copy is ready to be picked up. Paper copies can then be made by the organization of the approved flyer ONLY. Any flyers posted without the approval signature from Student Affairs will be taken down and the responsible organization fined (see handbook for list of fines).

Guidelines for approval:
1. Digital flyers for the electronic boards on campus MUST be uploaded in a JPEG or PNG file format. They must also be in a landscape orientation (i.e. PowerPoint slide size, 16:9, etc.).
2. Printed flyers MUST be uploaded in a PDF format.

Guidelines for posting:
- See *Publicity* section of the *UIWSOM Student Organization Handbook* for more information on posting regulations.

Using Canva to create flyers:
You are free to use any software you desire to create flyers. However, Canva has gained popularity in many educational institutions due to the ease of use and the aesthetic of their designs. Canva is an online software and is free to use:
- www.canva.com
- If you are using Canva, please check your flyer once you download it to ensure there are no watermarks – if your flyer has watermarks with the Canva logo, you will need to redesign it using a design that is not considered "Pro" or "Premium". Designs submitted with watermarks will need to be redesigned and resubmitted.

Promoting Your Events

Organizations are allowed to promote events in the following ways:
- Posting flyers on social media, on the electronic boards (Student Affairs will post for you on the e-boards), or posting paper copies on the campus corkboards
- Sending a News Post (https://engagesupport.campuslabs.com/hc/en-us/articles/360019496052-News-Walkthrough)

- Sending a message via Relay (https://engagesupport.campuslabs.com/hc/en-us/articles/204033354-Sending-a-Message-as-an-Organization-Leader)
- Sending an e-mail to your organization members ONLY
  - Organizations are prohibited from sending mass e-mails to the class e-mail addresses and to the SOM faculty, staff and administration

Prohibited forms of promotion:
- Sending mass e-mails to the official class e-mail addresses and to the SOM faculty, staff and administration
- Posters any larger than 8.5" x 11"
  - Posters are not permitted unless special circumstance approval is obtained from the Director of Student Affairs
- Yard signs or any other items (i.e. flags) that interfere with landscaping
- Sidewalk chalk, sidewalk paint, etc.
- Stickers, decals, magnets, or other small promotional items promoting an event or organization (this does not include items given away at events as take-aways – this is ONLY prohibited for promotional reasons)
- Posting/taping flyers on painted walls (glass and corkboards only)

Guest/Guest Speaker Approval Process

If you would like to host a guest speaker at your meeting or event or would like for attendees outside of UIW and UIWSOM to attend, you must follow the guest request process.

Who is considered a guest/guest speaker?
Anyone who is not a UIWSOM employee or learner is a guest and requires a guest form. This means *any* type of guest coming onto campus including individuals, groups, or companies/vendors.

What do I need from the guests to gain approval?
- For all guests: Full name & contact information
- For guest speakers: CV and/or resume (CV preferred)
- For guests who are physicians: Student Affairs will conduct a licensure check and social media check before sending to the Dean for approval

How to gain approval for a guest/guest speaker:
1. Submit your event for approval (events with guests/guest speakers require a 4-week minimum)
2. Within the event submission, there is a question asking if you are having a guest/guest speaker at your event:
   a. You will be prompted on the next page to fill in the guest information and upload their requested info (CV/Resume, etc.)
3. Once the event is submitted with the completed guest info, the approval process will begin – this process can take up to 2 weeks to verify, so submit your requests in a timely manner
4. Once your event is approved, this also indicates that your guest/guest speaker is approved and you may communicate the following information to them:
   a. Approved date, time, and location
   b. Where to check in with security (Building 1, main entrance)
   c. Where to park
      i. Parking map: https://uiw.campuslabs.com/engage/organization/SOM/documents/view/1156475
   d. To arrive at least 15 minutes prior to the event start time to allow time for security check-in and set-up
5. On the day of the event, you are responsible for meeting your guest at the security kiosk and walking them to their location

Organization E-mail Groups

If your organization would like to create an account for your officers and members:

1. Create an e-mail account through UIW (@uiwtx.edu):
   a. Send an e-mail to SOMStudentOrgs@uiwtx.edu with the subject line "E-mail Group Request: (Org Name)"
   b. Provide the following information in the e-mail:
      i. Names of officers who will be in charge of maintaining the e-mail group ("Owners")
   c. The group will be created (allow a max of 2 weeks for creation) and the Owners must do the following:
      i. Add and remove members/officers
      ii. Inform the officers on how the organization intends to use the group
   d. Each year when officers transition, the individual(s) in charge of maintaining the e-mail group must add the new "Owners" and remove themselves – Student Affairs is not responsible for adding or removing members/officers
   e. Keep in mind, you can only send e-mails TO this e-mail address, and you cannot send FROM/AS

Document Keeping

Your organization officers are responsible for keeping documentation of meetings, events, and other important data. You can keep your documents in whichever way is beneficial for your organization, but you must ensure that the following documents are always accessible to your members through Engage:

- Constitution & by-laws
- Mission statement
- Meeting minutes (if applicable)

Any other documentation can be kept in a way that benefits the organization, however, Engage is highly recommended since the documents on Engage do not have "owners" and will remain on the site indefinitely.

Conferences

Please understand that DO Learners/MBS Students wishing to attend conferences, seminars and events while enrolled at UIWSOM are acting representatives of the SOM.

Osteopathic Learners wishing to have travel approved to attend conferences, seminars or events must meet the following criteria:

- Must be in Good Academic Standing according to the current UIWSOM Student Handbook
- Submit an Absence Request Form no less than thirty (30) days prior to departure. If you do not submit an Absence Request Form before your conference, your absence will be considered unapproved. Also, keep in mind when submitting the absence request that you are not guaranteed approval. Student Affairs will contact you with your approval status.
- Travel does not fall during Black Out dates (refer to your academic calendars on eMedley).

Due to the novel nature of the DO curriculum, learners are prohibited from attending professional conferences during the first two units of year 1 or during assessment days.

If you are required to attend a conference by an official parent organization, please contact us at SOMStudentOrgs@uiwtx.edu.

Finances

For the most part, Treasurers are the officers that will handle the organization finances, but it is imperative that every officer understands how to request withdrawals and reimbursements, deposit money into the organization account, and who is in charge of signing certain forms/giving approvals.

For detailed financial procedures, legalities, and forms see the UIWSOM Student Organization Handbook or the attached Financial Procedures for Student Organizations document.

Account Numbers

To request your organization's bank account number or account balance:
https://uiw.campuslabs.com/engage/submitter/form/start/433851
It is best practice to request your account number before requesting a withdrawal of funds for an event, fundraiser, or officer reimbursement so you can ensure that there are enough funds to expend.

How do I deposit money into my organization's bank account?

If you need to deposit cash or a check (i.e. from a fundraiser) you will need to do the following:
- Fill out the deposit slip (in Student Affairs)
- Place the funds and deposit slip in an envelope (envelopes available in Student Affairs)
- Include on the envelope:
    - Organization's full name
    - Exact amount of money in the envelope
    - Signature of the President or Treasurer
    - Signature of Student Affairs representative
    - Today's date
- Submit the unsealed envelope to Student Affairs
- Once your envelope is submitted, your funds will be deposited into your account by the UIW Business Office

Are we exempt from Texas sales tax?

Yes. When using a bank card, petty cash, or any other expended funds you must also use the tax exemption form. The Comptroller's Office will **not** reimburse you for any sales tax paid. If you happen to pay tax using university funds, you will have to pay the tax amount out of pocket to the Business Office.

More Engage Resources:

If you would like to learn more about Engage and how to use certain features, please review the following articles, videos and tutorials provided by CampusLabs. If you have further questions or need assistance, contact us at SOMStudentOrgs@uiwtx.edu.

Note: UIW does not use the Finance or Service Hour features in Engage.

GENERAL
- **Navigating the Management Tools:**
  https://engagesupport.campuslabs.com/hc/en-us/articles/115005963023-Organization-Tool-Menu-Walkthrough

EVENTS
- **All About Events:** https://engagesupport.campuslabs.com/hc/en-us/articles/115001594463-Events-Walkthrough
  - **Creating a New Event:** https://engagesupport.campuslabs.com/hc/en-us/articles/204033924
  - **Tracking Event Participation/Taking Attendance:** https://engagesupport.campuslabs.com/hc/en-us/articles/204032034

NEWS POSTS
- **All About News Posts:**
  - https://engagesupport.campuslabs.com/hc/en-us/articles/360019496052-News-Walkthrough

FORMS
- **All About Forms:**
  - https://engagesupport.campuslabs.com/hc/en-us/articles/204032264-Forms-Walkthrough

DOCUMENTS
- **All About Documents:**
  - https://engagesupport.campuslabs.com/hc/en-us/articles/204032404-Documents-Overview

ELECTIONS
- **All About Elections:**
  - https://engagesupport.campuslabs.com/hc/en-us/articles/204033084-Creating-an-Organization-Election