To submit a New Initiative Request, switch to the *Manage* view of your organization, open up the organization tool drawer (3 horizontal lines), and select *Finance.* This option will only appear for you if you hold a position in your organization with organization-level access to Finance.

A funding request (aka "new initiative") is a request for additional funds above and beyond your organization's approved budget. To submit a funding request, once you have accessed your organization finance page, click the blue *Create Request* drop-down followed by "Create Funding Request."
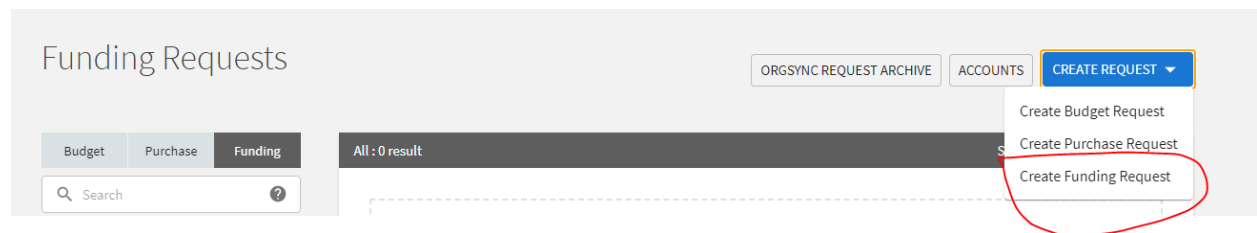
To create your purchase request, please follow the instructions in the "Additional Information" field at the <u>bottom</u> of the page. Please note, you cannot submit a request unless you follow the instructions and all required fields are populated.

Create Funding Request

Request Details

*Subject

Description

*Requested Amount

$ 0

*Categories

---- Select Category ----

*Account

SELECT...

---

*Categories

NEW INITIATIVE

Additional Information

* Please upload documentation to support your request.

UPLOAD FILE

A new initiative request should be submitted if your organization needs additional funds above and beyond what is approved in the organization's budget. Please do not submit a new initiative request until you have already used all the funds in your approved budget.

Please provide as much detail as possible when submitting your request. For example:

- Quotes/documentation with pricing verifying the cost of the request.

- Itemized detail if your request is for multiple expense items.

- Any other information to support your request

REQUESTS SUBMITTED WITHOUT SUPPORTING DOCUMENTATION, INCLUDING COSTS, WILL NOT BE CONSIDERED.