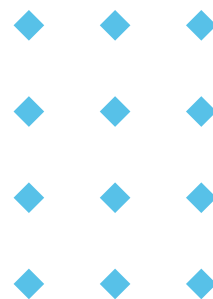




# EXECUTIVE HANDBOOK

Ontario Tech Student Union



# TABLE OF CONTENTS

Welcome to the C&S Department \_\_\_\_\_ 03

Deadlines & Timelines \_\_\_\_\_ 04

Executive Responsibilities \_\_\_\_\_ 05

How to Plan a Successful Event \_\_\_\_\_ 06

Level 1 Event \_\_\_\_\_ pg. 07

Level 2 Event \_\_\_\_\_ pg. 08

Level 3 Event \_\_\_\_\_ pg. 09

Essential Forms \_\_\_\_\_ 10

General forms \_\_\_\_\_ pg. 10

Finance Forms \_\_\_\_\_ pg. 11

Finance Forms: Key Info \_\_\_\_\_ pg. 12

Invoice Requirements \_\_\_\_\_ pg. 13

Helpful Links \_\_\_\_\_ 14

FAQ's \_\_\_\_\_ 15

Rubric Basics \_\_\_\_\_ 17

Profile Updates \_\_\_\_\_ pg. 17

Membership Updates \_\_\_\_\_ pg. 18

Event Approvals \_\_\_\_\_ pg. 19

Finance Form Submissions \_\_\_\_\_ pg. 20

Selling Merchandise \_\_\_\_\_ pg. 21

Inventory Bookings \_\_\_\_\_ pg. 22



# Welcome to the Clubs & Societies Department!

The Clubs & Societies Department at the Ontario Tech Student Union (OTSU) is here to help you make the most of your student experience! We oversee all student-led clubs and societies, providing guidance, resources, and support to help create meaningful connections on campus.

Our department is made up of a dedicated team of professionals and student leaders:

- **Student Engagement Manager** – Provides strategic oversight, ensuring the department aligns with OTSU's mission and student needs.
- **Member Engagement Coordinator** – Oversees the daily operations of clubs and societies, policy compliance, and leadership development.
- **Clubs & Societies Assistant** – Offers administrative and logistical support for events, ratification, and funding.
- **Clubs & Societies Committee** – A student-led body responsible for guiding key decisions, including policy updates, ratification approvals, and sanction reviews.
- **Student Executives (You!)** – The driving force behind every club and society, bringing ideas to life and building community on campus.

Together, we create a dynamic and engaging student life experience where your ideas can grow and thrive. Whether you're starting a new club, planning an event, or looking to collaborate, we're here every step of the way!

If you have any questions or need assistance, feel free to reach out to us!

**Clubs & Societies Assistant - Adina Khan**

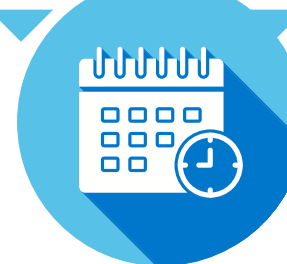
✉ [cs.otsu@ontariotechu.ca](mailto:cs.otsu@ontariotechu.ca)

**Member Engagement Coordinator - Tristann Podrats**

✉ [Tristann.Podrats@ontariotechu.ca](mailto:Tristann.Podrats@ontariotechu.ca)

~ C&S Department

# Deadlines and Timelines



Ratification Deadline.....	September 30th, 2025
Executive Training Completion.....	October 31st, 2025
Fall Event Form and Finance Form Deadline.....	December 1st, 2025
General Member List Deadline.....	March 31st, 2026
General Member Involvement Form Deadline.....	March 31st, 2026
Executive List Updates Deadline.....	March 31st, 2026
Winter Event Form and Finance Deadline.....	April 10th, 2026
Annual Reflection Form.....	April 30th, 2026
Inventory Report Form.....	April 30th, 2026

## Post-Ratification Digital Submission

Timeline: Submit within **10 business days** after ratification.

## Event Proposal Submission

- Level 1 Event: **5 business days** before the event
- Level 2 Event: **20 business days** before the event \*
- Level 3 Event: **45 business days** before the event \*

\* The submission deadlines for the External Guest Indemnification Form remain the same

## Guest Speaker Insurance Requirement Exemption

Timeline: Submit no later than **20 business days** before the event.

## Appeal After Event Denial

Timeline: Submit appeal within **5 business days** of the denial notice.

## Appeal for Inactivity (Fall Semester)

Timeline: Submit appeal within **10 business days** of receiving removal notice.

## Funding Requests

Timeline: Submit at least **10 business days** before the time of purchase

## Reimbursement of Funds Request

Timeline: Submit within **30 business days** from the original date of purchase

# Executive Roles & Responsibilities

Every club must have at least four executives:

- **President**
- **Vice President of Finance**
- **Vice President of Events**
- **Vice President of Communications**

<b>President</b> <ul style="list-style-type: none"><li>• Acts as leader and liaison with the OTSU.</li><li>• Oversees operations and executive team.</li><li>• Chairs meetings and ensures compliance.</li></ul>	<b>VP Finance</b> <ul style="list-style-type: none"><li>• Manages budget and financial records.</li><li>• Submits funding and reimbursement forms.</li><li>• Tracks inventory and ensures transparency.</li></ul>
<b>VP Communications</b> <ul style="list-style-type: none"><li>• Handles internal/external communications.</li><li>• Manages social media and promotions.</li><li>• Submits print media for approval before posting.</li></ul>	<b>VP Events</b> <ul style="list-style-type: none"><li>• Plans and coordinates events.</li><li>• Submits event forms by deadlines.</li><li>• Works with Finance and Communications for execution.</li></ul>

## RESPONSIBILITIES

### Expectations

- Complete all mandatory training and attend OTSU meetings.
- Operate within the approved mandate.
- Send at least 2 executives to the OTSU Annual General Meeting.
- Keep accurate financial and operational records.

### Prohibited

- Signing contracts without the OTSU approval.
- Commercial activity or compensation of executives.
- Awarding prizes to your own executives.
- Receive scholarships or bursaries from their respected club/society

### Conflict Resolution

\*Executives do not have the authority to discipline or remove other executives\*  
Issues must be reported to the Clubs & Societies Department and may escalate to the Committee if unresolved.

Note: Role changes/updates are locked after March 31st of the fiscal year.

# HOW TO PLAN A SUCCESSFUL EVENT



1

DETERMINE YOUR  
EVENT LEVEL



2

GATHER  
REQUIRED  
INFORMATION



3

SUBMIT THE  
EVENT FORM



4

AWAIT  
APPROVAL



5

PLAN AND EXECUTE  
YOUR EVENT

# LEVEL 1 EVENT Checklist

## WHO IS THIS FOR?

Ratified clubs: planning small, simple on-campus events for Ontario Tech students only.

- ✓ Fewer than 100 participants
- ✓ No external guests
- ✓ Minimal risk activities

## TIMELINE

Submit all required forms to OTSU at least **five (5) business days** before your event for approval

## PERMITTED

- ☐ **Meetings:** Club or executive meetings
- ☐ **Social:** Coffee chats, casual hangouts, small celebrations
- ☐ **Interactive:** Game night, karaoke, movie screening
- ☐ **Creative:** Arts & crafts, DIY sessions (bracelet making, painting)
- ☐ **Academic:** Study sessions, book clubs, debates, skill-sharing
- ☐ **Food Fundraisers:** Bake sales for internal club use (not external charities)

## IMPORTANT RULES

- Food:
  - Only food/refreshments may be sold or distributed
  - Must follow [OTU Bake Sale Guidelines](#)
- Payments:
  - Must use the OTSU Square platform to collect all funds
  - No merchandise or non-food item sales



**Keep your event exclusive to Ontario Tech students and on campus.**



**Follow the rules for food and payment.**

# LEVEL 2 EVENT Checklist

## WHO IS THIS FOR?

Ratified clubs hosting larger on-campus events for Ontario Tech students.

- ✓ 101-200 participants
- ✓ May include external speakers, judges, or performers (with approval)
- ✓ Moderate-risk activities requiring extra documentation

## TIMELINE

Submit all required forms **20 business days** before your event for approval.

- 10 days - OTSU review and risk assessment
- 10 days - University Risk Management approval

Late submissions will not be considered.

## PERMITTED

Examples include:

- ☐ **Guest Speaker Events:** Panels, Keynote talks
- ☐ **Cultural or Religious Celebrations:** Student-focused only
- ☐ **Fundraisers:** For registered Canadian charities
- ☐ **Social Events: Large mixers, themed nights**
- ☐ **Educational Competitions:** Case competitions, hackathons (with approved judges)

**\*Merchandise or Ticket Sales:** Following OTSU guidelines

## IMPORTANT RULES

- ✓ On-campus only: no off-campus events
- ✓ Attendance capped at 200
- ✓ External guests only as speakers, judges, or performers with prior approval
- ✓ Follow OTSU Bake Sale & Merchandise Guidelines
- ✓ Use OTSU Square for all sales

## REQUIRED DOCUMENTS

- Event Submission Form
- Emergency Management Plan
- Square Sales Info (if selling tickets/items)
- Charity Details (if fundraising)
- Food/Refreshment List (if applicable)
- Merchandise List (if applicable)

If you have External Guests:

- External Guest Indemnification Form (Signed and Completed)
- Certificate of Insurance (COI) (\$2M liability)



# LEVEL 3 EVENT Checklist

## WHO IS THIS FOR?

Ratified clubs hosting large-scale or high-risk events on campus or off-campus.

- ✓ Attendance over 200
- ✓ Multiple external guests or vendors involved
- ✓ Requires security planning, risk assessment, and multiple approvals

## PERMITTED

Examples include:

- ☐ Conferences or multi-speaker panels
- ☐ Cultural or international festivals
- ☐ Fundraising galas or banquets
- ☐ Large-scale social celebrations
- ☐ Performances, competitions, or concerts

## TIMELINE

Submit all required forms at **least 45 business days** before your event for approval.

- 10 days - OTSU review and risk assessment
- 10 days - University Risk Management + venue/service coordination

Late submissions will not be considered.

## REQUIRED DOCUMENTS

- Event Submission Form (with full itinerary)
- Emergency Management Plan
- Security & Crowd Control Plan
- Square Sales Info (if selling tickets/items)
- Charity Details (if fundraising)
- Food/Refreshment List (if applicable)
- Merchandise List (if applicable)

If you have External Guests:

- External Guest Indemnification Form (Signed and Completed)
- Certificate of Insurance (COI) (\$2M liability)

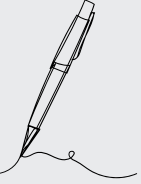
If Off-Campus:

- Venue Contract: signed third-party venue agreement
- Certificate of Insurance (\$5M coverage)

## OFF-CAMPUS CRITERIA

- ✓ Venue must meet safety and meet accessibility standards
- ✓ Venue contract reviewed and signed by the OTSU Executive Director
- ✓ Proof of **\$5M liability insurance** naming OTSU & Ontario Tech as additional insured
- ✓ Security plan developed with OTSU (entry control, emergency response)
- ✓ All third-party vendors (DJs, catering, etc.) must provide a contract for review and signature and provide the necessary insurance requirements

# ESSENTIAL FORMS



One of the first steps of running successfully as a Club/Society is being aware of the essential forms and when to use them. These forms help keep your event, finances, and operations organized and compliant with our OTSU policies.

## EVENT FORM

To notify OTSU of upcoming proposed events and obtain approval to ensure policy compliance, safety, and proper support.

↳ Submitted by executives  
(VP Events rec.)

## Annual Reflection Form

To summarize the Club/Society events, initiatives and attendance trends throughout the year. This report reflects the group's successes, challenges, and lessons learned, analyzing how well it met its mission.

↳ Submitted by executives  
(President rec.)



## Inventory Report Form

This report lists all merchandise and prize items in the Clubs'/Societies' possession. It is updated throughout the fiscal year and submitted to the Financial Controller for tracking. All items must be handed over to the OTSU for summer storage and will be returned at the start of the next school year.

↳ Submitted by executives  
(VP Finance rec.)

## General Member Involvement Form

For general members who contribute significantly beyond expected participation and wish to receive Student Experience Record (SER) recognition.

↳ Submitted by President  
of Club/Society



## Sanctions Form

Allows students to report policy violations, misconduct, or safety concerns related to Clubs and Societies. Complaints must be submitted within 30 days of the incident and include all required details for review and appropriate action. The form is available on the OTSU website.

↳ Submitted by student  
reporting the infraction

## Post-Ratification Digital Information Form

To collect essential details from ratified Clubs & Societies to create and maintain their profile on the OTSU website and Rubric. It ensures accurate, approved information is displayed and kept up-to-date.

↳ Submitted by executives  
(VP Communications rec.)

## External Guest Indemnification Form

Required when a Club/Society intends to invite an External Speaker or Organization to an event. It ensures that all parties involved understand and accept liability responsibilities. This form must be submitted alongside the Event Form within the required timelines for Level 2 & 3 events.

↳ Submitted by executives  
(VP Events rec.)

## Print Media Approval Form

To request approval before poster on campus, ensure all posters comply with university and OTSU standards.

↳ Submitted by executives  
(VP Communications rec.)



# Finance Forms



## Reimbursement of Funds Form

This form is used to request reimbursement for out-of-pocket spending done by Executives for their respective Club/Society. This form must be signed off by two (2) signing officers and cannot be signed by the student who made the purchase.

Submitted by: The student who made the purchase on behalf of their Club/Society

## Purchase Request Form

To request payment made on your Club/Societies behalf. For online purchases, larger expenses and online subscriptions.

Submitted by: Executives (VP Finance rec.)

## Prize Claim Reimbursement Form

This form is used to request reimbursement for out-of-pocket purchases related to prizes done by Executives for their respective Club/Society. This form must be signed off by two (2) signing officers and cannot be signed by the student who made the purchase. It must correspond to the awardee's prize claim form.

Submitted by: The student who made the purchase on behalf of their Club/Society

1

2

3

4

5

6

## Prize Claim Form

To record all prizes awarded at Club or Society events. This form must be completed by the awardee when the Club/Society is seeking reimbursement for the event prizes.

Submitted by: the student awardee of the prize

## Third Party Payment Request Form

To process invoice payments or donations on the Club/Societies behalf for third party individuals and organizations. All invoices must be billed to the Ontario Tech Student Union.

Submitted by: Executives (VP Finance rec.)

## Transfer of Funds Request Form

To request for transferring funds from a Club/Society to another ratified student group for the purpose of partnership & collaboration. Proof of involvement in a joint event must be provided for transfer of funding approval.

Submitted by: Executives (VP Finance or Events rec.)



# Finance Forms



Ensuring you have the right information

## Reimbursement of Funds Form

The purchase must be linked to an Approved Event and listed in the event details.

The bank details and reimbursement request must be under the same student's name.

The Reimbursement must be submitted within 30 Days from the time of purchase

### Documents You Need to Submit

- Itemized Receipt (PDF)
  - Must show:
    - Store details
    - Date of Purchase
    - HST # and HST \$
    - Proof of payment (for purchases made in USD)
- Direct Deposit Slip (PDF)
  - Must include:
    - Full Name
    - Banking Details (Transit #, Institution #, Account #)

## Purchase Request Form

The purchase must be linked to an Approved Event and/or been discussed with the Finance Controller directly.

### Documents You Need to Submit:

- Direct link to where the item can be purchased
  - Include details on quantity/qualities (e.g., size, colour, model)
- Quotation (if applicable)
- Subscriptions:
  - Provide account login details
  - Must have a set duration
  - Card cannot be saved for future purchases

## Prize Claim Reimbursement Form

The purchase must be linked to an Approved Event and the Prize/Award must be listed in the event details.

The bank details and reimbursement request must be under the same student's name.

A Prize Claim Form must have been submitted by the Awardee

### Documents You Need to Submit

- Itemized Receipt (PDF)
  - Must show:
    - Store details
    - HST # and HST \$
    - Proof of payment (for purchases made in USD)
- Direct Deposit Slip (PDF)
  - Must include:
    - Full Name
    - Banking Details (Transit #, Institution #, Account #)

## Third Party Payment Request Form

The purchase must be linked to an Approved Event and listed in the event details.

The Vendor must provide their Bank Details for Direct Deposit

### Documents You Need to Submit

- Signed Vendor Contract
  - Submitted with your event request.
  - If approved, the OTSU Executive Director will sign it.
  - You must include the signed copy with your request.
- Invoice (PDF)
  - Must be addressed to OTSU (not the Club/Society).
- Direct Deposit Slip (PDF)
  - Must include:
    - Full Name
    - Banking Details (Transit #, Institution #, Account #)

## Transfer of Funds Request Form

Must be linked to an Approved Event which both groups are collaborating on.

Must provide the Full Name of both Clubs/Societies and their Account Numbers

### Documents You Need to Submit

- Proof of Collaboration



## Remember!

Financial forms require 10 business days to be processed by our Finance Department.

The timeline begins only after all required documentation has been submitted correctly and in full.



# WHAT SHOULD MY INVOICE LOOK LIKE?

- ☒ Company Legal Name
- ☒ Company Address
- ☒ Date the Service was Rendered
- ☒ Invoice should be Addressed to OTSU
- ☒ Invoice Number
- ☒ Description of Service or Product
- ☒ HST Number (If Applicable)
- ☒ HST Amount ( If Applicable)
- ☒ Contact Name and Phone Number

## FINANCE RELATED QUESTIONS?

### CONTACT OUR FINANCE DEPARTMENT:

Finance Generalist: [joann.scott@ontariotechu.ca](mailto:joann.scott@ontariotechu.ca)

Financial Controller: [mayooran.thurairajah@ontariotechu.ca](mailto:mayooran.thurairajah@ontariotechu.ca)

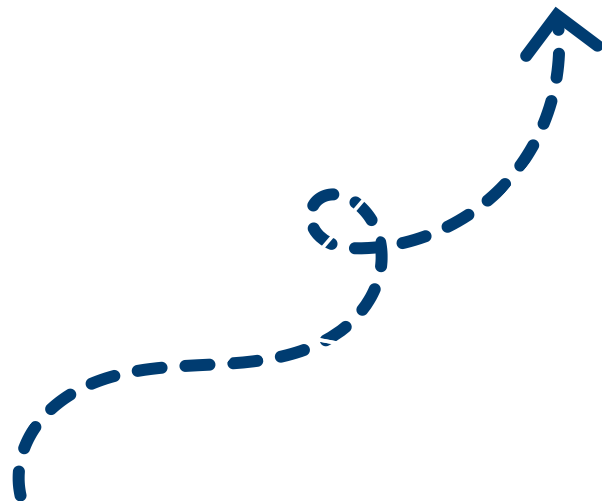
# HELPFUL LINKS

## OTSU RESOURCES

- [Official OTSU Website](#)
- [Clubs Policy & Procedure](#)
- [Societies Policy & Procedure](#)
- [Clubs Financial Procedure](#)
- [Societies Financial Procedure](#)
- [Clubs & Societies Sanctioning Procedure](#)
- [Sanction Form](#)

## UNIVERSITY POLICIES

- [Student Conduct Policy](#)
- [On-Campus Food Services](#)
- [Bake Sales on Campus](#)
- [Vetting Guest Speakers at the University](#)
- [Serving Food at Events & Meetings](#)
- [Respectful Campus Policy](#)
- [OTU Postering Policy](#)



# Frequently Asked Questions

- |   |   |   |
|---|---|---|
| 1 | <b>Can I join more than one club?</b>                                   | Yes! You're welcome to join as many clubs as you'd like as a general member. However, students may hold a maximum of two executive roles in total across all Clubs & Societies, and only one of these may be a Presidential role.   |
| 2 | <b>How do I book a room on campus for my Club event?</b>                | When submitting your Event Form, be sure to indicate that you require a room booking. If your Club/Society has a preferred space in mind, include that information as well. While specific rooms are not guaranteed, every effort will be made to accommodate your request based on availability. |
| 3 | <b>What happens if one of the executives doesn't complete training?</b> | All executives who have not completed training by the deadline will not be granted signing authority and will have their executive membership revoked from Rubric.  |
| 4 | <b>How can I replace an executive who has stepped down?</b>             | Email the Clubs & Societies Engagement Coordinator explaining the situation. Once the situation is assessed, further information will be provided regarding the executive's status and appointing a new executive.  |
| 5 | <b>What is the Annual General Meeting (AGM)?</b>                        | The Annual General Meeting (AGM) is a yearly gathering where the OTSU's Board of Directors and Executives meet with students, our stakeholders, to share updates, report our finances, and most importantly, hear from you! For Clubs & Societies, it is mandatory that two executives attend.    |
| 6 | <b>What happens if I lose a receipt?</b>                                | Clubs are then at risk of not being reimbursed. It is at the discretion of the Financial Controller to deem if the group should provide an alternative proof of payment.  |
| 7 | <b>What happens if our Club overspends?</b>                             | You will be reimbursed for the portion of funds that are available in your account only. No Club may carry a negative balance.  |
| 8 | <b>How long does it take to get reimbursed? What if I'm late?</b>       | You have <b>30 business days</b> from the date you made the purchase to submit your reimbursement request. If you miss that deadline, your request will not be processed unless you were granted approval ahead of time from the Financial Controller.  |

9 **What is a list of equipment items I can request from OTSU for my event?**

OTSU offers a limited selection of equipment that Clubs & Societies can borrow for their approved events. Requests for these items should be addressed in the appropriate Event Form and should be booked under the “Inventory” tab on Rubric, if they are available. Commonly offered items include:

- Popcorn Machine
- Microphones
- Speaker
- Giant Jenga

Equipment availability is limited and is provided on a first-come, first-served basis. Items must be returned at the end of the event. If you require special accommodations, please contact our team in advance.

10 **How do I ship a package to the OTSU office for my Club/Society?**

If your Club needs to receive a package on campus, you may have it shipped to the OTSU office. Please follow these steps to ensure it arrives without issue:

**1. Notify OTSU Staff in Advance**

- Please email or message Adina or Tristann before the item is shipped. This helps us make sure the office is open and we know to expect the delivery.

**2. Label the Package Correctly**

- Clearly write your full Club name followed by “ – OTSU” on the shipping label. This alerts Shipping & Receiving where to bring it.

Ex. ICE CREAM CLUB – OTSU  
40 Founders Dr, Oshawa, ON L1H 7K4

**3. Weight Limit**

- Packages should not exceed 35 lbs. If your item is heavier, we will have to coordinate in advance with **Shipping & Receiving** to accommodate.

**4. Follow up on Delays**

- If you receive a shipping delay notice, please follow up with OTSU staff so we can assist as needed.

**5. Delivery Window**

- Let the seller know that deliveries can only be accepted Monday to Friday, 8:00 AM to 4:00 PM. Deliveries outside of these hours cannot be received.

11 **Can my Club make our own posters?**

Yes, your Club can. To get your poster approved please complete the Print and Digital Media Approval Form. Once **approved** by OTSU, posters may only be displayed in designated areas. Please refer to the [OTU Postering Policy](#) for full guidelines.



# RUBRIC BASICS

## If you're reading this.....



Congrats! You've already had a chance to explore Rubric, create your account, and submit your Ratification package. Now, here are some other important features you can manage through your Rubric profile to keep your group running smoothly:

### Note on Terminology

This new platform is based in Australia and uses terminology that differs from standard OTSU language. For clarity, please refer to the legend below when navigating through the platform.

Rubric Term	OTSU Equivalent
Affiliation	Ratification
Grant	Finance Forms
Non-Affiliation	Not Affiliated

## PROFILE UPDATES

### Add Your Executive Team:

1. Log into your account
2. Click the **circle icon** (top right corner)
3. Select **Add/Remove Exec Members**
4. Click **Create New Role**
5. Type in the **Role Name** (e.g., President, VP Finance)
6. Select the **permissions** for the role (can be changed later)
7. Ignore the default roles if they don't apply
8. You may add up to **15 executive roles**
9. Click **Add Club Executive**
10. Fill out the following for each exec:
  - Name
  - Email address
  - Student ID
  - Assigned Role
11. Every club must include these 4 positions:
  - President
  - Vice President of Finance
  - Vice President of Communications
  - Vice President of Events



**NEXT** >>



# MEMBERSHIP UPDATES



## Club/Society Memberships

### Step 1: Log In Properly

Make sure you're logged into your **club's profile** or **executive account** – not your personal student account.

### Step 2: Create a Membership Type

1. Click on **Memberships**
2. Click **Membership Types**
3. Click **Create Membership**
4. Click **New Membership Type**

### Step 3: Fill Out Membership Details

1. **Enter Membership Name**
  - Most clubs should use **"General Membership"**
  - You may also create other types to organize by **year of study, program, or other categories**
2. **Membership Duration:**
  - Valid from **September 2, 2025 – May 1, 2026**
3. **Set Membership Price:**
  - This should be **\$0.00** unless you've received **prior approval** from OTSU
  - Clubs that charge without approval will face sanctions
4. **Add a Description**
  - Explain what being a member includes (e.g., access to events, communications, meetings)
5. **Membership Form Guidelines:**
  - Keep questions **generic**
  - Do **not** ask for **personal or private info**
  - **Clubs:** Cannot restrict who joins
  - **Societies:** May turn on approvals to verify members belong to their faculty
6. Click **Add Membership Type**

### Step 4: Share Your Membership Link

- Click **Link in Bio**
- **Copy and share** your unique club/society link with students
- This is how they will **sign up and join your club**

**START COLLECTING MEMBERS AND GET THE WORD OUT ABOUT YOUR CLUB/SOCIETY!**

## Manually Adding Clubs/Society Members

### Step 1: Log In

Make sure you're logged into your club's profile or executive account – not your personal student account.

### Step 2: Import Members

1. Click on **Memberships**
2. Click **Import Memberships**
3. Choose to import:
  - **Executives**, or
  - **Multiple Membership Types**



### Step 3: Upload Your Member List

1. Download and complete the **Rubric-provided template**



- Fill in all required fields (e.g., name, email, student ID, etc.)

2. Upload your completed file to the platform
3. Click **Continue to Matching**

### Step 4: Review & Submit

1. **Double-check** that all member info is correct
2. Click **Submit List**

**Your members are now added to your club profile!**

**NEXT** >>

1

8



# EVENT APPROVALS (SUBMISSIONS)



## Step 1: Create a New Event

- From your **club portal**, click **Events**
- Click **Create New Event**
- Click **Create Event**
  - If this is a **collaborative event** with another club/society, click **Create Collaborative Event** instead
- Select your **Event Category**
- Click **Next**

## Step 2: Fill out Item Details

1. Enter the **Event Name**
2. Set the **Event Start Date & Time**
3. Set the **Event End Date & Time**
4. Upload a **Promo Banner** (this will appear on your event page)
5. Choose your **Event Location**:
  - Online
  - On Campus
  - Off Campus
6. Add a **General Description** of your event
7. (Optional) Link a **Facebook Event Page**
8. Click **Next**

## Step 3: Set Up Ticketing

**All events must use ticketing** for attendance tracking.

1. Set the **Ticket Opening & Closing Dates**
2. Ticket price should be **\$0.00** unless there's a direct event/venue cost
  - a. Any event that you wish to **sell tickets for must go through the Warehouse Submission Form** not directly on the event form.
3. Click **Add Ticket**
4. Enter the **Ticket Name**
5. (Optional) Enter the **Ticket Quantity**
6. Choose ticket availability:
  - Only for your club members
  - Open to all students
7. Click **Save**
8. Click **Next**

## Step 4: Complete the OTSU Event Form

1. Fill out all **Ontario Tech Student Union Questions**
  - Be sure to complete the form **top to bottom**
2. Read all **Acknowledgements** carefully
3. Sign in **agreement**

## Step 6: Final Review & Submission

1. Review your **Event Summary** to ensure everything is accurate
2. Click **Publish**

## Step 5: Add Merchandise (If Applicable)

This is an automated feature by Rubric. The OTSU will continue to use the **Warehouse Submission Form** for all merch related items.

For this reason, we have turned off this feature. Rubric will allow you to create the merchandise but we prompt an error if you try to publish it.

**NEXT** >>

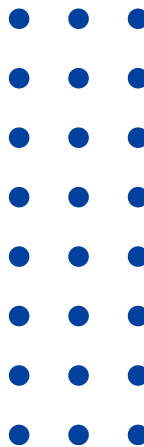


# FINANCIAL FORMS (SUBMISSIONS)



## Step 1: Log into your Club Account

- From your **club portal**, click **Forms**
- Locate **Grant Forms**
- Click **View All**
- Select one of the following,
  - **Reimbursement Form**
  - **Third Party/Vendor Payment Form**
  - **Transfer of Funds Form**
  - **Prize/Award and Gift Reimbursement Form**
  - **Purchase Request Form**



## Step 2: Complete the Form

- Select the **correct form** and fill out all **required questions**.
- Find your **Club/Society Account Number**:
  - Go to the OTSU website → Executive Tools → open your most recent ledger.
  - Search for your Club/Society's full name (no abbreviations).
- Fill out the form and attach the required documentation.
- Ensure all documents are saved in PDF format.
- Save the completed form as a draft.

## Step 3: Signing Authority

- All forms must be signed by **two club executives before submission**.
  - These executives cannot be the ones requesting the funds.

### How to Sign Your Draft Form:

- Go to **Forms** → click **Submissions** (left-hand side).
- At the top of the page, locate your **Draft Submissions**.
- Select the draft you want to sign.
  - Under **Action**, click **Edit Draft**.
- Scroll to the last page of the form → **Executive Signatures section**.
- **Enter**:
  - Your full name
  - The date of signature
  - Your signature
- Once **both executives** have signed, click **Submit**.

## Step 4: Waiting Approval

- The **Finance Department** will review your form.
- If more information is needed, you will be contacted.

### How to Check Your Status:

- Go to **Forms** → click **Submissions** (left-hand side).
- Scroll to **All Submissions**.
- Use filters to view: **Pending** | **Approved** | **Declined** | **All**.
- Under **Pending**, find your form to see:
  - Current **status**
  - **Stage** of approval (e.g., 3/4 approvers)
  - Any **staff notes**
- **Once approved**:
  - An email will be sent to your club email and the student listed on the form.
- **Reminder**: Allow up to **10 business days** for processing.

**NEXT** >>

2

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# PUBLISHING & SELLING MERCHANDISE



**Important:** All merchandise must be pre-approved by the Clubs & Societies Department before it's published.

- If you're selling **merch or food during an event**, make sure to **include this in your Event Approval Form**.
  - You must select the **Square Payment Processor** in Inventory Booking and submit a **Warehouse Item Form**.
- If you're selling **merchandise not tied to an event** (e.g., executive or club apparel), you must submit a **Warehouse Item Form** through the online form.

## Step 1: Access the Warehouse Form

1. Log in through your **club profile**
2. Click on Forms
3. Under **Other Forms** click **Warehouse Item Submission Form**

## Step 2: Fill out General Information

1. Enter the **Club/Society Name**
2. Enter your name and email address
3. Complete the pre-populated questions
4. Upload an **image** of your Club/Society's **logo**

## Step 3: Fill out Item Information

1. Select the **Listing Type**
2. **Enter the Listing Title**
3. Add a **Description**
4. Upload an **Image** of the item(s)
5. Enter the **Item Name**
6. Enter the **Item Quantity**
7. Set the **Price**

## Step 4: Additional Details (If Applicable)

- Add additional information or comments if necessary
- Examples:
  - Add any variation **options** like:
    - Sizes (e.g., S, M, L)
    - Colours
    - Styles
  - Ticket deals
    - Early Bird vs Regular

## Step 5: Finalize & Submit

1. Click **Continue**
2. **Review** submission details
3. Ensure all information is accurate
4. Read and Acknowledge **Terms and Conditions**
5. Click **Submit Form**

## NOTE

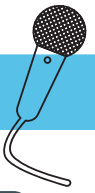
- The Clubs & Societies Department will be notified once your merchandise request is submitted.
- If additional information is required your Club/Society will be contacted directly.
- Please allow 2-3 Business Days for requests to be published.

**NEXT** >>





# INVENTORY BOOKINGS



## Step 1: Submit your Event

- All inventory bookings must be linked to an approved event.
- If your event is denied your inventory request will be automatically removed from the calendar.

## Step 3: Wait for Approval

1. The **Clubs & Societies Department** will review your request.
2. If approved, a confirmation will be sent to your **club/society's general email**.

## Step 4: Picking up your Item

1. On the day of your event, send a designated student to pick up items from the:
2. **OTSU Main Office - SHA 115**
3. At pick-up, the student will complete the **Asset Tracker Form**.
4. Note: The OTSU office closes at **5:00 PM**. All items must be picked up before closing.

## Step 2: Complete an Inventory Request

1. Go to your Club Portal on Rubric and complete your **Event Form** as normal.
2. At the bottom of your form you will be prompted to request inventory or not.
3. Click **Yes**.
4. Select the items you need.
5. Enter:
  - a. **Pick-up time** and **drop-off time**
6. A **Warehouse Item Form** must be submitted when reserving the **Square Payment Processor**.
7. **Continue** with your **Event Form**.
8. Click **Submit**.

## Step 5: Returning your Item

1. Items must be returned to the **OTSU Main Office before 5:00 PM**.
2. If returning after hours, contact **Campus Security** to access the office for drop-off.
3. Return all items in the **same condition** you received them.
4. Note: The **popcorn machine** must be returned clean, with all popcorn removed and surfaces wiped.

## From Our Team to You, Thank You!

The C&S Department team is so grateful for your passion, leadership, and commitment to making our campus a place where everyone can feel welcome and engaged. Your hard work and creativity inspires us every day. Here's to a year full of amazing events, collaborations, and memories!

**NEXT** >>

2

2