

A thick black L-shaped graphic in the top-left corner of the slide.

HOW TO SUBMIT AN ONLINE BANKING CONTRACT

Tools for Treasurers with a SABS Bank Account

A thick black L-shaped graphic in the bottom-right corner of the slide.

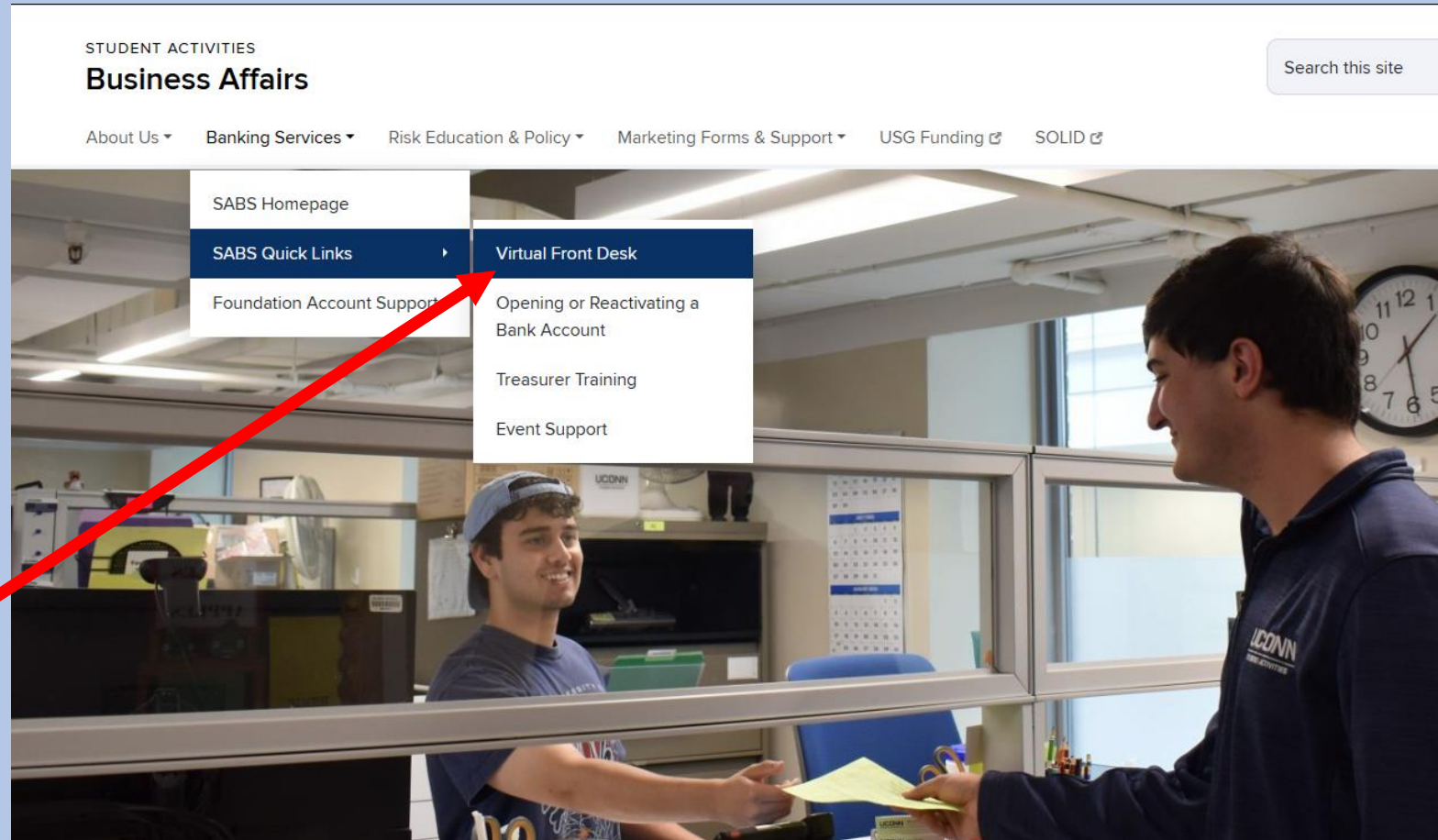
Step 1: Virtual Front Desk

1. Go to the DSA Financial and Program Support website

<https://businessaffairs.studentactivities.uconn.edu/>

2. Select Virtual Front Desk

(Note: you will need to use the navigation menu)



Step 2: Finding the Form

Virtual Front Desk

Note: If links produce error message, refresh page to launch forms.

ONLINE BANKING CONTRACT 

Complete an online banking contract.

**ONLINE MARKETPLACE & DUES COLLECTION
REQUEST** 



Complete an online marketplace and dues collection request.

ONLINE DISBURSEMENT REQUEST 

Complete an online disbursement request.

FORMS & FINANCIAL TOOLS

Find tools to help you make a deposit, submit a stop payment request, and more.

**VIEWING BANK ACTIVITY ON
UCONTACT**  

Check out this step-by-step guide to see bank activity on UContact!

**ACCESSING YOUR SABS ONLINE
SUBMISSIONS**

Stay updated on your SABS online submission status.

3. Select **Online Banking Contract**

Step 3: Access the Form

1. Sign in with your NetID and password
2. If you have done so correctly you will see this page

1 AM

DRAFT

Discard

Save

Submit

×

UConn

Directions

The student officers on this contract are authorized to review disbursements:

- Signatures from the Treasurer, President, Advisor, and one additional Executive Officer are required.
- A second Executive Officer is encouraged.
- Each person listed on the Banking Contract must be a unique individual, even if they hold more than one Executive Officer position within the organization.

Basic Information

Effective Dates *

...

Organization Name

Organization Number

Notes:

- Use the search field below to select your organization
- To populate options, enter a keyword from your organization's name
- If your organization does not appear in the search, type "NEW" and select "NEW - This organization does not have a bank account with SABS yet"

Q

Beneficiary Information

Step 4: Effective Dates/Org Name

- Choose your contract's Effective Dates and Organization Name

Choose your desired Effective Dates from the drop-down

Basic Information

Effective Dates *

Organization Name *

Notes:

- Use the search field below to select your organization
- To populate options, enter a keyword from your organization's name
- If your organization does not appear in the search, type "NEW" and select "NEW - This organization does not have a bank account with SABS yet"

Organization Number

Follow the instructions to find your organization. If done correctly, your Org's Number will auto-populate

Step 5: Beneficiary Information

Beneficiary Information

This section lists your organization's beneficiary information - where remaining funds will go, should your organization disband or become defunct.

In the event the organization ceases operations and/or does not renew its contract for an entire academic year or does not remove its funds before such time, the organization authorizes SABS to disburse any remaining funds to the designated beneficiary. **This form supersedes any information in your constitution or on file with the Department of Student Activities.**

The designated beneficiary may not be an individual and must include a mailing address in the United States of America.

We recommend:

- The beneficiary be a charity or an entity/organization that has demonstrated commitment and stability.
- The beneficiary be voted on by the organization's membership and included in the minutes of that meeting.

Beneficiary Name

Beneficiary Address

Beneficiary Contact Number

Beneficiary Notes

Beneficiary Status *

- ☐ We certify that the beneficiary information is correct and up-to-date
- ☐ We would like to change/update the beneficiary information for our organization
- ☐ We would like to establish a new beneficiary (NEW organizations must select this option)

In this section your Org's current Beneficiary should auto-populate. If your club wants to keep the same one select the first option. If you would like to make any changes, select the option that fits the change best from the bottom two

Step 6: Treasurer Information

Enter the Treasurer's
information in all the
fields

Treasurer		
Treasurer *		
<input type="text"/>		
Treasurer's NetID	Treasurer's Phone Number *	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>
Treasurer's Preferred Email *		
<input type="text"/>		

Step 7: President's Information

Enter the President's
information in all the
fields

President	
President *	
<input type="text"/>	
President's NetID	President's Email
President's Phone Number *	
<input type="text"/>	

Step 8: Executive Officers 1 & 2 Information

Enter the Executive Officer 1's information in all the fields

Executive Officer 1	
Executive Officer 1 *	Executive Officer 1 Title *
<input type="text"/>	
Executive Officer 1 NetID	Executive Officer 1 Email
<input type="text"/>	<input type="text"/>

Executive Officer 2	
Executive Officer 2	Executive Officer 2 Title
<input type="text"/>	
Executive Officer 1 NetID	Executive Officer 2 Email
<input type="text"/>	<input type="text"/>

Note: Executive Officer 1 is required; Executive Officer 2 is optional but highly recommended

Step 9: Advisor's Information

Enter the Advisor's information in all the fields

Advisor *	
Q	
Advisor's Email	Advisor's Phone Number *

Step 10: Submitting your Banking Contract



A horizontal bar containing four buttons: 'Discard', 'Save', 'Submit', and a close button (X). The 'Submit' button is highlighted with a red border. A red arrow points from the text on the right towards the 'Submit' button.

Once you have filled out all the required fields and have looked over the information for accuracy, click Submit on the top right of the form

What happens next?

See next slide for next steps



What happens next?

1. Send directions to the President, Advisor, and Executive Officer(s) you listed on the form (see slide **14**: *Instructions for Signers*)
2. In this online platform (Kuali Build), people on the banking contract are referred to as Signers
3. All signers will receive an email from Kuali Notifications:
 - Subject line will say: “Request for Approval: SABS Banking Contract”
4. Signers only receive their email once the previous signer has approved the form
5. Signers must open the form, review the data, sign, and approve or deny the form as submitted



What happens next? *(continued)*

6. SABS will approve the form when the information provided matches your organization's UConn roster and all authorized Signers have given the form their Approval.
7. You will be notified of this approval.
8. Email SABS@uconn.edu if you have not received an approval notification and would like a status update
9. If one of the Signers denies the contract, it will be returned to the Treasurer, who will then need to revise and re-submit
10. Once your banking contract has been approved, you are able to submit disbursements and set up events



Instructions for Signers

EXECUTIVE OFFICERS AND ADVISORS (AUTHORIZED SIGNERS ON SABS BANKING CONTRACT)

1. Open the email from Kualiti Notifications with the subject line “Request for Approval: SABS Banking Contract”
2. Click the Begin Review box in the email to open the form
3. Review the contract information
- 4a. If **you agree** with the contract information:
 - a. Click on the Sign this form box under your name
 - b. Type your name in the box to E-sign the form
 - c. Click Save
 - d. Click the Approve box in the top right corner of the form (under Actions)
 - e. Comments are optional then click the Approve box
- 4b. If you **do not agree** with the contract information:
 - a. Click the Send Back box in the top right corner of the form (under Actions)
 - b. Enter reason in the Add Comments box and click the Send Back box
- 4c. If you **do not want this contract to exist** or do not want to be a part of this contract:
 - a. Click the Deny box in the top right corner of the form (under Actions)
 - b. Enter reason in the Add Comments box and click the Deny box