

# Student Organization Annual (SOA) Report

FIN-TRE-VI-190



## About This Policy

Effective Date:

10-01-1990

Last Updated:

11-18-2016

Responsible University Office:

Office of the Treasurer

Responsible University Administrator:

Vice President and Chief Financial Officer

Policy Contact:

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University Bursar

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## Scope

All Indiana University units and employees.

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## Policy Statement

Each campus is responsible for the analysis of their Student Organization Office financial activity on an annual basis at June 30, and for the subsequent preparation and distribution of a Student Organization Annual financial report. A copy of the report shall be forwarded to the chief accountant, Financial Management Services, IUB, so that it can be included in the university's annual report.

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## Reason For Policy

To insure that all University funds or funds held in trust by the University are accounted for and are included in the annual financial report of the University.

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## Procedure

It currently is the responsibility of the bursar on each campus to produce the financial report for the SOA reports.

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## Definitions

The financial report shall include an operating statement that shows beginning balance, income, expenses, change, and ending balance, as well as bank reconciliation statement that ties to the ending balance.

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## History

This policy was established on October 1, 1990.

Revised to add scope November 2016.