

# ADVISOR APPROVAL PROCEDURES PIONEER LIFE



## 1

### Be on the Club / Organization Roster

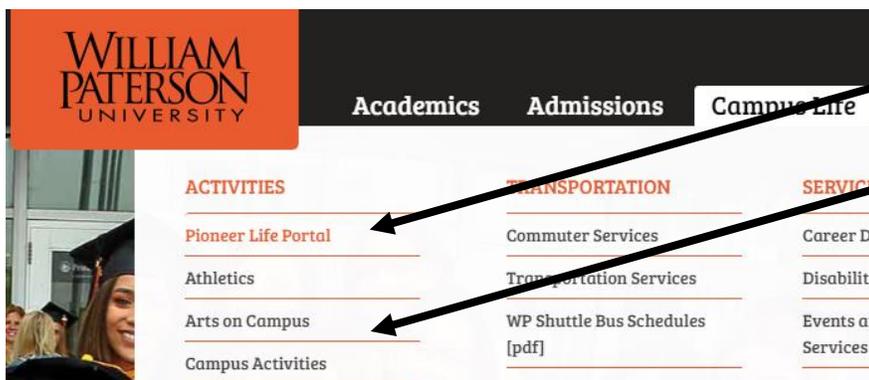
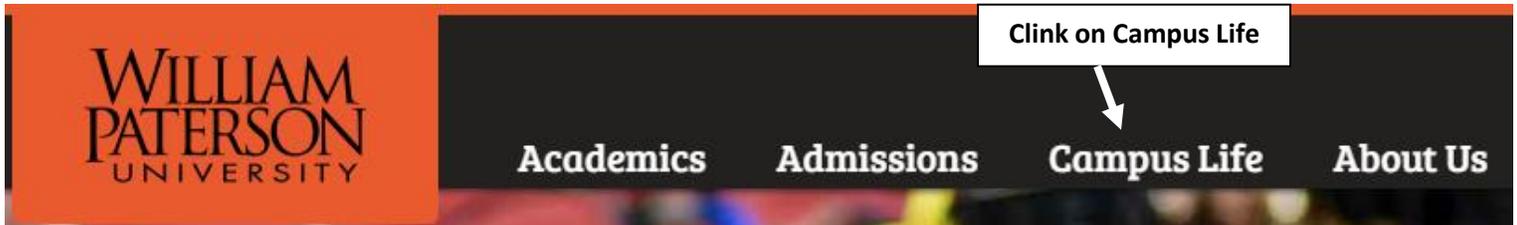
- I. Advisors play an important role when working with student groups. Advisors must be a fulltime William Paterson University Faculty or staff member. Only one advisor may have access rights to facilitate the advancement of an organizations financial request. Advisors also:
  - Support the mission of the organization,
  - Support the organization by attending events,
  - Work to help brainstorm events for the organization to present to the campus community.
  - One of the more important parts of an advisor, is their support of helping to process a funding requests for the club or organization to be added to the allocation meeting agenda.

Advisors are the second stage in the financial approval process and must follow the following steps to be able to process any requests. The following is a step by step guide that will assist advisors in moving a request along.

The first and most important part of any approval process is making sure you have the access you need to find the request to advance the stage. You first need to be member of the club. To make this happen, you must first request to be a member of the organization.

Do this by finding the organization on Pioneer Life:

Pioneer Life may be found on our home page:



Click on the Pioneer Life Portal Tab or you can also click on campus activities where you well also be able to find a link to Pioneer Life portal.

Sign in using your WConnect log in.

SIGN IN

HOME EVENTS ORGANIZATIONS NEWS



Once you are logged in, click on the organizations tab at the top and locate the organization you are the advisor for.

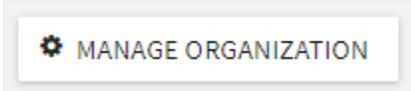
Once you find the organization, you need to be on the roster. Click the “Join Organization” Button. This will put you on a list for the primary contact of the organization to assign you as the advisor. They must do this in order for you to have the access and viewing rights you will need to approve financial request to stage two and to review event forms. The primary contact must assign you the “Advisor” status on the roster.

## 2

### Find the Financial Request

Once the advisor is set on the roster and has the “Advisor” status by their name, you are ready to review event forms and move financial requests to stage two. In order to move the financial form, you must follow the steps below in order to locate the request.

1. Log-in to the pioneer life system
2. Locate the organization you are an advisor for
3. Locate the “Manage Organization” button in the upper right hand corner
4. Once you click the manage organization button, a new web page will open up and you will see three lines in the upper left-hand corner. Please click on the three lines 
5. You will now see a menu appear on the left hand side. Click on the finance button



Home

Organization Tools

- Roster
- About
- Events
- News
- Gallery
- Documents
- Forms
- Elections
- Finance
- Service Hours

1. Locate your clubs financial request by clicking on the "Finance" tab
2. Click on the tab that says "Funding Requests"



3. Search for your specific event:

Advisors are always the second stage in a financial approval process. Stage one is the person who entered the details originally, most likely the clubs leadership. Advisors can search for financial requests by the stage of approval, the status of the event, or the title of the event. In most cases, less is more. For example, you are asked to approve an event called, "Business Etiquette Luncheon". If you have a typo or did not know the full event name, you might not find the correct financial request. In this case, search for "business" or "Lunch" as your key search words. Less is more when search for a title of your clubs event.

Subject	Approved Amount	Date Approved	Status	Stage	Action
Ascend Regional Conference			Unapproved	Stage 2	
Meet the Firm			Unapproved	Stage 2	
Business Etiquette: "Mock-Tail Party"			Unapproved	Stage 2	
Business Etiquette Luncheon			Unapproved	Stage 1	

## 3 Change the Stage

Once you find the financial request you are approving, click the change stage button



**Current Stage**  
Stage 1

**Stage (required)**

**Comment**

Advisors need to be the Stage 2 approvals. Make sure the stage box is set to stage 2. Please note, it is possible to move a request back a stage. For example, if the financial request has already been processed to stage four, the advisor could move it back to stage 2, thus not allowing the financial request to be heard at allocations. Please do not move a stage backwards

After you have moved the request to stage two, it is important that you inform the student leader the request has been moved and to inform the student leader to make an appointment with a Campus Activities staff member ASAP to go thru the remaining stages of approval. At any time, the advisor may contact Campus Activities if they are unsure of the financial request approval process or if they have any other questions related to the club or event they are supporting.

Campus Activities is Stage three in the process and that allows the student to attend allocations. Stage four is set once the allocations committee reviews the request. Stage five is when the club has been approved at allocations and the SGA Financial Advisor has assigned a purchase number to the request.