

Campus Guidance for Purchasing and Payments

The tables below present the forms of payment available and when to use each. Non-conformance with this guidance may have transactions sent back for correction.























CSUBUY P2P Forms:

Goods and Services Form	Hospitality Form (Non-Travel)
<p>Use to request goods and/or services that are not available via any catalogs (punchouts). Examples include:</p> <ul style="list-style-type: none"> Classroom or Laboratory Supplies Drone Equipment Furniture Goods - Other <ul style="list-style-type: none"> Includes local Hotels for applicants/guest (NOT for Fresno State employees or students) Marketing or Branded Items Services - Other Transportation Charters Vehicles 	<p>Use to initiate a request for non-travel Hospitality, such as:</p> <ul style="list-style-type: none"> Apparel Promotional Items (NOTE: all other promotional items go through Printing Services) Award or Service Recognition Catering (Campus Dining Services) - please follow the steps below: <ul style="list-style-type: none"> ● Get quote from Dining Services, sign it and return to Dining Services to place your order ● Submit P2P Hospitality form with signed quote attached. ● When you receive your invoice from Dining Services, look up your PO number in P2P and write it on the invoice and then email the invoice to accountspayable@mail.fresnostate.edu Catering (Off campus vendor) - <i>Recommend to use ProCard when possible</i> <ul style="list-style-type: none"> ● Get quote, submit P2P Hospitality Form with quote attached and Procurement will place the order for you Entertainment Services Farewell Award or Event Food and food related items (napkins, utensils, cups, coffee, etc.) Gifts Gift Cards Morale Function Participation Incentive Table, Chair, Canopy rentals Venue Rentals for Events

Direct Pay Form	Independent Contractor Form	Facilities and Construction Requests Form <i>(Used by Facilities Management only)</i>
<p>Use to initiate a Direct Payment of a voucher. Examples include:</p> <ul style="list-style-type: none"> Academic Recruitment Commission/Fee Attorney Fee Candidate expense (requires interview certification, invoices and receipts) Commercial paper program costs Freight / Postage / Shipping Legal Settlement Medical Service Payment Memberships <i>(Preferred to be placed on ProCard)</i> Official/Referee Payment Permit / License (non-IT) Royalty Payment Scholarships Sponsorships Subscription/Publication (non-IT) - <i>(Preferred to be placed on ProCard)</i> Utilities (Electricity, Gas, Oil, Water, Sewage, Hazardous Waste, Telecommunication, Direct Pay, or Other) 	<p>Used to initiate a request for services provided by an individual who is self-employed, a guest speaker, or a guest lecturer. Examples would be:</p> <ul style="list-style-type: none"> Guest Speaker or Lecturer Individual Providing Service to the Campus and/or Athletics 	<p>NOTE: this form request is for Facilities Management use only to initiate a Facilities or Public Works Project. Examples include:</p> <ul style="list-style-type: none"> Construction General Services / Installation and Supply Maintenance of State Facility or Property Professional Services (related to Public Works) Other
IT Hardware Form	IT Software Form	Payment for Unauthorized Purchase Form
<p>Use to initiate a request for IT Hardware and Accessories</p>	<p>Use to initiate a request for IT Software, Website or Software Maintenance, or Cloud Services.</p>	<p><i>* Only used when needed - for when trying to pay an invoice after the fact for a category not allowed on the Direct Pay (these items Procurement should have placed the order to the vendor)</i></p>

CSUBUY P2P Punchout Catalog Vendors

You can buy directly from the Punchout Catalog vendors listed below within CSUBUY P2P without having to use one of the forms above. A ProCard will no longer be used for these vendors.

					
Information Technology ▼					
					
Laboratory, Scientific, Medical & Athletic ▼					
					
Facilities Management ▼					
					
					

Transactions NOT processed in CSUBUY P2P and Need to Use Process Listed below:

Procurement Card (ProCard)	ProCard Hospitality Form (available on Procurement Website)	Direct Pays (available in Forms Portfolio)
<p><i>Do not use if Company is listed in the CSUBUY P2P Shopping Punchout Catalog module</i></p> <p>Items the ProCard should be used for:</p> <ul style="list-style-type: none"> Advertisements Conference fees/registration Off Campus food - with an approved ProCard Hospitality Form and an approved Food Waiver from Dining Services On campus food - Panda Express, Starbucks, and Subway, with an approved ProCard Hospitality form <p>Transactions that can't be processed in P2P and are allowed on the ProCard</p> <p><i>Requires manager approval on monthly reconciliation.</i></p>	<p>Only to be used for Pro-Card purchases if applicable</p>	<ul style="list-style-type: none"> Employee reimbursements (non-hospitality related) Payroll check requests Refunds Student reimbursements Travel reimbursements

Additional Information and forms:

- Procurement: 559.278.2111 <http://fresnostate.edu/adminserv/purchasing/>
- Accounting Services: 559.278.2876 <http://www.fresnostate.edu/adminserv/accountingservices>

Reminders:

Employee reimbursements

- Itemized receipts are required for all non-travel related employee reimbursements up to \$300.
- Technology equipment or software must be purchased using CSUBUY P2P. Employees will NOT be reimbursed.
- No reimbursement for purchases made on a personal Amazon account.
- All travel must be processed through Concur.
- Any exceptions for employee reimbursements to be approved by Director of Procurement or the University Controller.

Amazon purchases

- All campus purchases from Amazon must be made in CSUBUY P2P. The ProCard cannot be used to make purchases from a personal Amazon account. It is not allowed to use a personal Amazon account with a personal credit card to make campus purchases and then ask for reimbursement.

Purchase Requisitions are required in advance of ordering goods or services in order to:

- Protect Fresno State and ensure risk is mitigated through indemnification and proper insurance endorsements.
- Ensure Fresno State utilizes CSU and State Master Contracts & receives the best price and value for products and services.
- Meet State mandated goals for Disabled Veteran Business Enterprise (DVBE), small business and recycled products requirements.
- Track spend for spend analysis and encumber funds.

Limits

- Purchase Requisitions and Direct pay invoices that are greater than \$100,000 require pre-approval by division Vice President.

Promotional items

- All items with the Fresno State logo require pre-approval by the Trademark Licensing Department and an approved CSUBUY P2P Purchase Requisition Hospitality Form.