Cal State Fullerton

Procurement Pathway

FY 2024-25

REQUISITIONS
Tips and Tricks to Avoid Delays

To ensure that your Requisitions get processed in a timely manner, ensure that the following required items are done:

1. The vendor is NEW in CSUF system: https://financialservices.fullerton.edu/controller/ap_travel/services/payments/NewVendorRequest.php

2. Vendor has provided an updated Quote and Insurance

3. If it is software or computer purchase ensure that an IT Request is completed for a RITM #: https://www.fullerton.edu/itpurchasing/

Allow 3-5 Weeks Processing Time

FY 2024 REQUISITIONS MATRIX

REMINDER: Splitting a purchase to circumvent bidding requirements is prohibited.

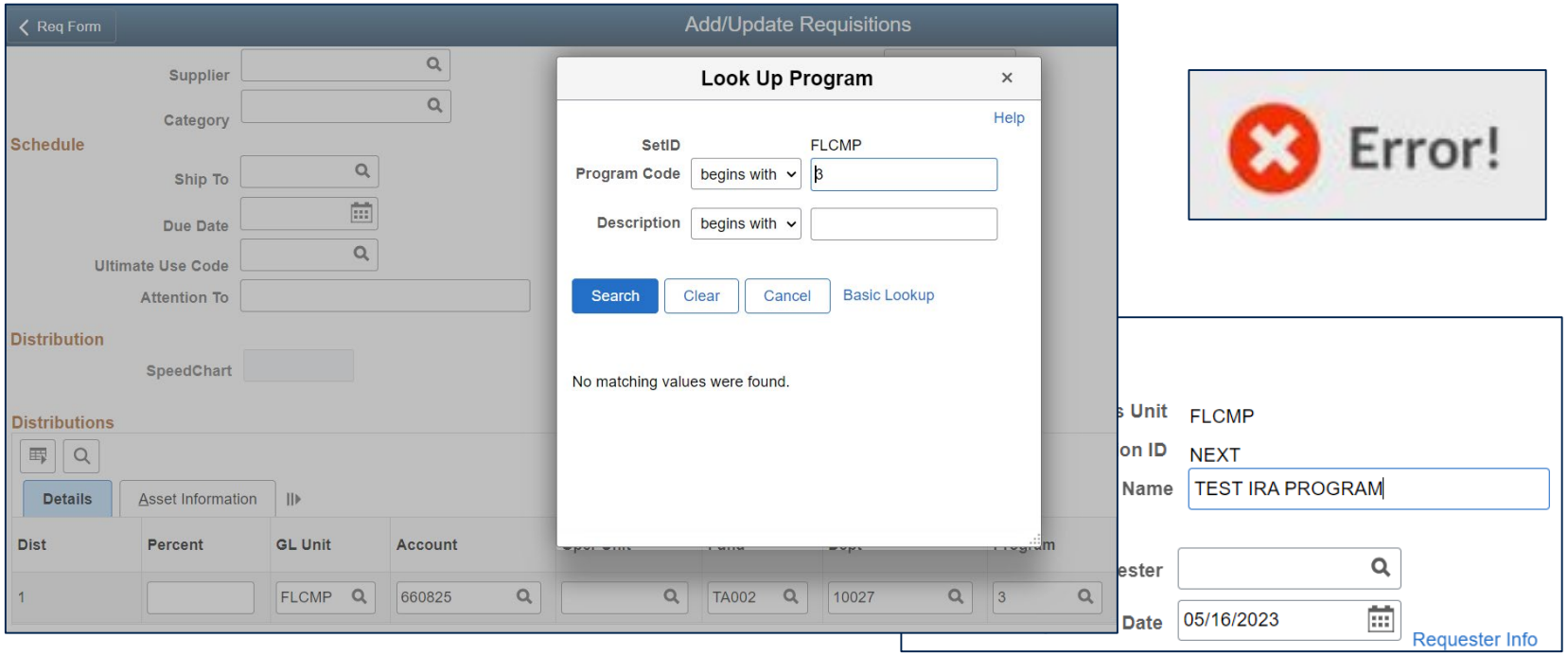
CFS Requisition Requirements			
Transaction Type	**Final Purchase Dollar Amount**	**Minimum Quote Requirements**	**Additional Requirements**
Commodities (i.e. furniture, lab equipment)	Less than $50k	One Quote	• SmartSheet-PaymentWorks • Valid quote within last 30 days • Purchase can possibly be made via P-card
	Equal to or Greater than $50k and Equal to or Less than $100k	3 or more quotes from different vendors	
	Greater than $100k	Formal Bid per ICSUAM Policy	
Information Technology (i.e. computers, software subscriptions)	Less than $50k	One Quote	• IT Authorization Number must be obtained prior to submitting Requisition • Vendor SmartSheet - PaymentWorks • Valid quote within last 30 days • Purchase can possibly be made via P-Card
	Equal to or Greater than $50k and Equal to or Less than $500k	3 or more quotes from different vendors	
	Greater than $500k	Formal Bid per ICSUAM Policy	

FY 2024 REQUISITIONS MATRIX

CFS Requisition Requirements Continued…			
Transaction Type	**Final Purchase Dollar Amount**	**Minimum Quote Requirements**	**Additional Requirements**
Services (i.e. editing, installation, maintenance)	Less than $50k	One Quote	• Vendor SmartSheet - PaymentWorks • Valid quote within last 30 days • Insurance documentation • SETC/ADA Compliance
	Equal to or Greater than $50k and Equal to or Less than $100k	3 or more quotes from different vendors	
	Greater than $100k	Formal Bid per ICSUAM Policy	
Promotional Items (i.e. Public Identity, Image Gear, Vail Dunlap)	P-Card can be used but it must be a vendor listed on the C&P website or Certified DVBE/SBE Vendor		
Zero Dollar Agreements (i.e. Service Learning, Clinical, Student Teaching, Internships, IT Software License, Athletic)	• No requisition required • Contract Request Form (CRF) must be submitted to C&P Inquiry Form		

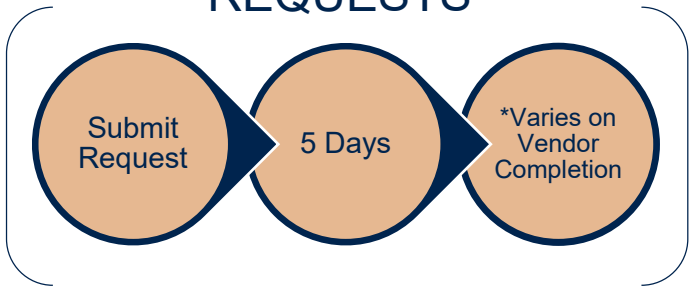
FY 2024 REQUISITIONS

Requisition Date should be EQUAL TO or GREATER THAN 07/01/2024



REQUISITIONS
Timelines (3-5 Weeks Processing)

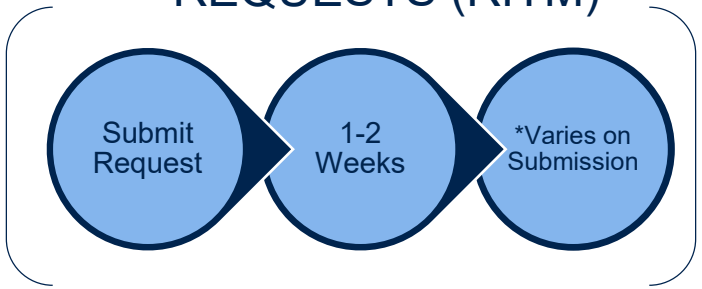
NEW VENDOR REQUESTS



*Timeframe varies on Vendor Completion of the Form

Contact:
AP@fullerton.edu

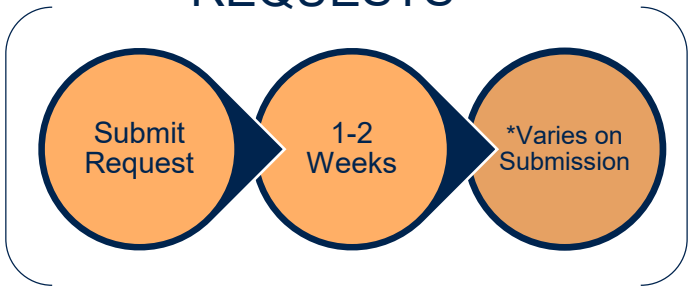
IT PURCHASING REQUESTS (RITM)



*Timeframe varies on items requested

Contact:
DL-itpurchasing@fullerton.edu

REQUISITION REQUESTS



*Timeframe varies on submission and additional requests as needed.

Contact:
DL-C_and_P@fullerton.edu

What does eBusiness do?

P-Card Program:

- Provides and oversees university-issued procurement cards (P-Cards) for efficient and simplified methods to procure low-dollar goods and limited services.

Amazon Business Prime:

- Set up user accounts and troubleshoot issues related to Amazon Business Prime.

CSUBUY:

- Assists with assigning Shopper and Requester roles related to the CSUBUY Marketplace.

Staples:

- Set up user accounts and troubleshoot issues with Staple, our CSU-contracted vendor for office supplies.

P-Card Programs

Requesting a P-Card

- Who qualifies for a P-Card?
  - Be a CSUF part-time or full-time employee
  - A CSUF employee with an appointment of six (6) months or greater
  - Instant Card requesters must have official university travel associated with Athletics or IRA funds. Additionally, the requester may include CSUF-enrolled students 18 years of age or older.
- Preventing P-Card Application & Agreement Delays:
  - Selecting the right card for your program and funding sources
  - Providing detailed justification for credit limits requested for more than the predetermined amounts.
  - Obtaining the appropriate signatures

Complete the P-Card Application and Agreement Form and obtain authorized signatures.

Submit to eBusiness at ebusiness@fullerton.edu and allow 2-3 weeks for processing.

In the 2-3 weeks, mandatory training must be completed before the card is picked up.

Cardholder Tips

- Utilize the pre-vetted vendors found on the Pre-Approved Vendors List and On-Site Approved Caters List.
- Seek a Q# (pre-authorization to pay for service on a card) for service providers not found on the pre-vetted vendor lists. **Please allow 2-3 weeks for processing.**
- Request a temporary limit increase to make a large purchase. Splitting a purchase to circumvent established credit limits is prohibited. **Please allow 1-2 weeks for processing.**

Type of P-Card Programs

Card Types	One Card	Declining Balance Card (Short-Term)	Instant Card (For Student Travel)
Card Description	A One Card may be used to make purchases of goods, supplies, and specific services.	A Declining Balance Card is a short-term card issued with a credit limit set as the maximum amount for a specific event or timeframe.	An Instant Card is a virtual card that allows students to purchase meals on official CSUF travel.
Timeframe (Period in which a card may remain open)	Ongoing	A year or less	Six (6) months or less
Set Card/Single Limits (justification needed increased Amts)	$5,000/$2,500	$25,000/$5,000	Less than $500/$0
Reconciliation Process	Concur	Concur	Manual
Expenses*			
Individual Employee Meals	No	No	No
Individual Employee Meals on Travel	No (personal funds to be used and reimbursed via travel claim)	No (personal funds to be used and reimbursed via travel claim)	No (personal funds to be used and reimbursed via travel claim)
Individual Student Meals on Travel	No	No	Yes
Group Meals	Yes	Yes	No
Group Meals on Travel	Yes	Yes	No
Registration	Yes	Yes	No
Flight	Yes	Yes	No
Car Rental/Transportation	Yes	Yes	No
Lodging	Yes	Yes	No
General Supplies	Yes	Yes	No
Equipment	Yes (less than $5,000)	Yes (less than $5,000)	No
Advertisement	Yes (w/Q# and is less than $1,000)	Yes (w/Q# and is less than $1,000)	No

P-Card vs Requisition (PO)

When to use a P-Card

Commodity

Tangible goods, including office supplies, easily movable furniture, equipment, computers, etc.

Information Needed for Credit Limit Increase:

- Quote(s)
- Amts increase from/to
- Increase credit limit duration
- Detailed business purpose

*Commodity purchases are less than $5K

Service

Non-tangible and tangible labor, including repairs, certain installation, equipment and venue rentals, printing, catering, etc.

Information Needed for Q#:

- Quote
- Scope of Work
- Detailed business purpose
- COI/Proof of Insurance
- Risk evaluation

*Services are less than $5K, a Q# is required

When to submit a Requisition

Commodity

Tangible goods including office supplies, furniture, equipment, computers, software, etc.

Additional Documentation:

- Quote(s)
- ICT form (ICT Form)
- EH&S approval

*Commodity Purchases over $50K must be formally bid by procurement and contracts

Service

Non-tangible labor including repairs, maintenance, consulting, rentals and leases, any type of installation, speakers/lecturers, etc.

Additional Documentation:

- COI/Proof of Insurance
- Quote
- Scope of Work
- IC form
- Risk Evaluation

*Service Orders over $50K must be formally bid by procurement and contracts

Public Works

Construction, alteration, repair or improvement of any public structure, building, road or other public improvement of any kind.

Additional Documentation:

- Various
- Contact Procurement or Facilities with questions

**Excludes Instant Card.*

***All expenses must adhere to the campus policies and procedures, including but not limited to the P-Card Program Policy, Employee and Student Travel Policies, and the Hospitality Policy. Any disallowed purchases must be reimbursed to the state immediately.*

CSUBUY Marketplace

An online marketplace for CSU campuses to shop for goods and services at negotiated prices.

CSUBUY Benefits

- Both P-Card holders and non-P-Card holders can access CSUBUY Marketplace.
- Direct access to CSU negotiated rates, with potential savings of 17-29%
- Access to many of the vendors already used
- Compare pricing across multiple vendor catalogs
- Ability to view orders all in one place

To register, click *Login to CSUBUY*. Select Fullerton and then use SSO credentials.

If you are a cardholder, email eBusiness at ebusiness@fullerton.edu requesting your CSUBUY role be changed to Requester.

Allow for 3-5 business days for the role to be updated in CSUBUY.

CSU The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

ADDITIONAL RESOURCES

FOR ADDITIONAL INFORMATION PERTAINING TO THE HOSPITALITY JUSTIFICATION FORM (D-11):

A Hospitality Justification Form (D-11) should be filled out and approved ***before*** procuring items for Entertainment Services, Recreational, Sporting, and Entertainment Events/Activities, Food and Beverages (Non-Alcoholic) including Group Travel, Students and Prospective Students, Awards/Prizes, Service Recognition, and Promotional Materials.

Please refer to the Streamlined Success: Navigating Honorariums, Check Requests, Hospitality, Travel, Field Trips & obtain Foreign Travel Insurance
Presentation and Video Link.

Contact Us

Emails:

DL-C_and_P@fullerton.edu

eBusiness@fullerton.edu

Phone:

657.278.2411

Website:

https://financialservices.fullerton.edu/cp/

CSUF | Contracts and Procurement
ADMINISTRATION AND FINANCE

Cal State Fullerton

Survey Link

NEXT UP: BREAKOUT INFO SESSIONS

ALL SESSIONS WILL BE RECORDED

with slides uploaded to the IRA Website

Unlock the power of financial clarity! In this session, you'll delve into the Chart of Accounts, also known as the Chartfield string, and gain an understanding of account, fund, class, and program codes. Discover how these Chartfield strings craft your budget story within OBIEE, CSUF's financial reporting tool. You'll also learn how to efficiently run and interpret revenue and expense reports.

Budget Clarity

Discover the various methods for procuring goods and services, tailored to meet the unique needs of your program. Learn when to create a Purchase Order, how to obtain IT Authorization, secure a Q Number from E-Business, and effectively use a Procurement Card for seamless transactions.

Procurement Pathways

Master the essentials for managing these critical aspects of your program. Learn how to efficiently process honorariums, handle check and hospitality requests, coordinate travel, organize field trips, and obtain foreign travel insurance—all while ensuring compliance with university policies. We'll provide you with best practices, practical tips, and the tools you need to streamline these tasks.

Streamlined Success

Schedule of Events

Welcome Session (All) 10:00 am- 10:30 am

Break (All) 10:30am- 10:35 am

Session 1 (Pre-Assigned) 10:35 am -11:15 am

Break (All) 11:15 am -11:20 am

Session 2 (Participant Choice, 5 Sessions) 11:20 am- 12:00 pm

Unlock the skills of efficient hiring practices. Whether you're quick-hiring special consultants, hiring student assistants or graduate assistants, setting up position student task profiles, or requesting volunteers, this session will equip you with the knowledge and tools you need. Learn how to navigate each process smoothly and ensure compliance with university guidelines.

Efficient Hiring

Gain the expertise to navigate study abroad programs effectively. Learn about CSUF's requirements and processes for proposing, coordinating, and leading a department/faculty-led program abroad. Understand how Study Abroad and Global Engagement (SAGE) partners with Risk Management to manage risk, ensure student safety, and follow related university protocols.

Global Journeys