

State and Foundation Forms

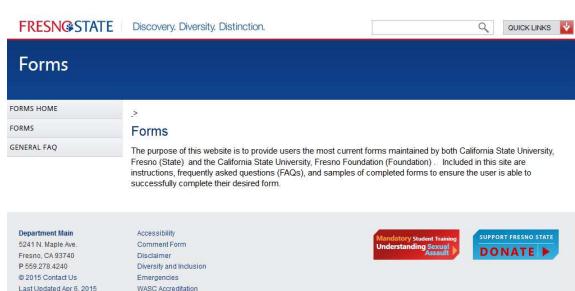
The Problem

Form users are having problems filling out State and Foundation forms. There is confusion over what form to use for a given process, where to acquire the form, who to contact if they have questions, and what information/documentation is required when submitting the form. This confusion leads to an increased number of calls and e-mails for guidance to the processing staff. Incorrect submissions can lead to rejection of the form, causing delays in form and payment processing.

The Solution

A centralized form site will provide information about the forms to enable successful completion, will effectively communicate form changes/updates, will ensure that users are able to determine what form is needed to obtain their desired outcome, and will ensure users are able to find the most up-to-date form.

All forms on one site...



The screenshot shows the Fresno State Forms website. The top navigation bar includes links for 'Discovery. Diversity. Distinction.', 'QUICK LINKS', and a search bar. The main content area is titled 'Forms' and lists several categories: 'TRAVEL', 'PAYOUT REIMBURSEMENT', and 'HUMAN RESOURCES'. Each category contains a table with form names, revision dates, formats (e.g., PDF, Word), and 'More Info' links. The 'TRAVEL' section includes 'Travel Approval Form' (11/19/13) and 'Travel Expense Claim Form' (12/13/14). The 'PAYOUT REIMBURSEMENT' section includes 'Community Relations Authorization' (11/19/13), 'Payment Authorization' (11/19/13), 'Purchase Order' (4/6/15), 'Payment Authorization for Student Support' (1/28/15), and 'Student Support Spreadsheet' (1/28/15). The 'HUMAN RESOURCES' section includes 'Additional Employment Agreement' (10/18/12), 'Change Employee Personal Information Form', and 'Hourly Time and Effort Report'.

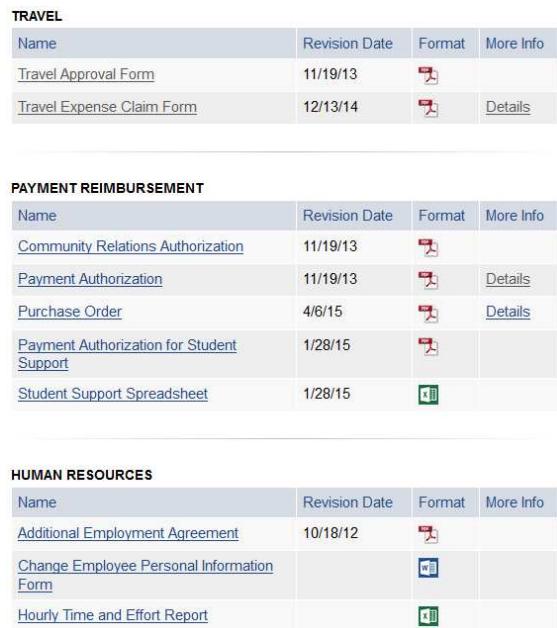
Visit our proposed site at
<http://webdev.fresnostate.edu/caife-forms/index.html>

Take a quick survey at
<https://www.surveymonkey.com/r/CAIFE-Forms>

or by scanning this QR Code



better organized...



The screenshot shows the proposed form site. It features a clean, organized layout with three main sections: 'TRAVEL', 'PAYOUT REIMBURSEMENT', and 'HUMAN RESOURCES'. Each section contains a table with form names, revision dates, formats, and 'More Info' links. The 'TRAVEL' section includes 'Travel Approval Form' (11/19/13) and 'Travel Expense Claim Form' (12/13/14). The 'PAYOUT REIMBURSEMENT' section includes 'Community Relations Authorization' (11/19/13), 'Payment Authorization' (11/19/13), 'Purchase Order' (4/6/15), 'Payment Authorization for Student Support' (1/28/15), and 'Student Support Spreadsheet' (1/28/15). The 'HUMAN RESOURCES' section includes 'Additional Employment Agreement' (10/18/12), 'Change Employee Personal Information Form', and 'Hourly Time and Effort Report'.

This bold idea was submitted by Nancy Gomez

The Team

Executive Sponsor: Clint Moffitt

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and with more details.

Direct Pay

Description

The Direct Pay and Hospitality Approval Form is used to request a check payment to a vendor, employee, or student.

[Direct Pay Form](#)

[Direct Pay Guide and FAQ](#)

Form Directions

<http://www.fresnostate.edu/adminserv/accountingservices/ap/directpay.html>

Direct Pay Processing

Direct Pay processing is available for eligible expenditures directly charged to a department's account without a purchase order. Direct Pay requests, including non-payroll reimbursements to employees, are submitted to Accounts Payable for processing.

Is the Expenditure Eligible for Direct Pay?

Pursuant to California State University policy, Accounts Payable is not allowed to pay for services to any California State University employee, including students for services performed that would be paid through campus payroll. Please contact the Payroll Office at 278-2032 with questions.

Reimbursements to Employees

1. Complete the Direct Pay Form (My Fresno State>Forms Portfolio)
2. Attach original receipt(s) verifying payment was made
3. Reimbursements exceeding \$300.00 and food purchases require approval from Procurement.
4. Employees are required to enroll in the non-payroll [direct deposit](#) program.