

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.

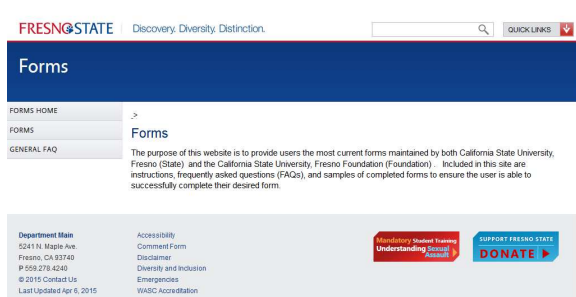
This bold idea was submitted by Nancy Gomez

The Team

Executive Sponsor: Clint Moffitt

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All forms on one site...



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...

TRAVEL			
Name	Revision Date	Format	More Info
Travel Approval Form	11/19/13		
Travel Expense Claim Form	12/13/14		Details

PAYMENT REIMBURSEMENT			
Name	Revision Date	Format	More Info
Community Relations Authorization	11/19/13		
Payment Authorization	11/19/13		Details
Purchase Order	4/6/15		Details
Payment Authorization for Student Support	1/28/15		
Student Support Spreadsheet	1/28/15		

HUMAN RESOURCES			
Name	Revision Date	Format	More Info
Additional Employment Agreement	10/18/12		
Change Employee Personal Information Form			
Hourly Time and Effort Report			

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.