

CSU San Marcos Hospitality Requestor Quick Reference Guide

The purpose of this guide is to assist the person requesting hospitality to determine that the hospitality expense is appropriate, follows the hospitality guidelines, has the appropriate supporting documentation, the form is completed accurately, and has the appropriate routing for approvals.

Please ensure the hospitality form is complete and answers the questions, who, what, when, where and why. (Who is participating, what is the purpose, when and where will it take place, and why is it necessary.)

Items to review and confirm when requesting a hospitality form	
<input type="checkbox"/>	The hospitality is necessary, appropriate, and serves a bona fide business purpose (has a direct or indirect benefit to the University).
<input type="checkbox"/>	The hospitality expense is allowable per CSU Policy .
<input type="checkbox"/>	The hospitality expense is allowable within the CSUSM Guidelines .
<input type="checkbox"/>	The funding source is appropriate to the type of hospitality expense. ¹
<input type="checkbox"/>	A <u>detailed</u> description of the expense is provided, and all the required supporting documentation is attached. Please only include approval pages if in an email and menu is not necessary as support should contain budget for type of meal/refreshments being served.
<input type="checkbox"/>	The appropriate chartfields and vendor information is included. The vendor should be the entity or person who will ultimately be paid or reimbursed. For example, if a department has an off-site meeting at a restaurant and the manager is paying the bill personally and getting reimbursed, the vendor is the manager, not the restaurant. If the restaurant will be paid via ProCard, the restaurant is the vendor.
<input type="checkbox"/>	The appropriate signatures have been included in the routing, and if the approver meets two or more of the approver lines, their name is in the most stringent field. ²
<input type="checkbox"/>	The professional organization meeting is only for members of a learned society and not a meeting solely for CSUSM employees.
<input type="checkbox"/>	The Hospitality Level I or Level II approving authority is also not the employee being reimbursed via Direct Pay.
<input type="checkbox"/>	The hospitality involves a meal or light refreshments, and it is within the allowable per person maximum per day.
<input type="checkbox"/>	The hospitality involves a meal, serves a bona fide business purpose, is not personal benefit, nor is it for convenience. What is not allowed is employees going to lunch to discuss business when it may be accomplished during business hours.
<input type="checkbox"/>	If the hospitality contains promotional items to employees, it is under \$50 (excluding tax and shipping).
<input type="checkbox"/>	If the hospitality is for employee gift cards, the employee will sign the gift card acknowledgement and gift card procedures will be followed. ³
<input type="checkbox"/>	If the hospitality is for a student award, it is a documented campus award program and published on the University's website. ³
<input type="checkbox"/>	If the hospitality is for an employee award, it is an official award program documented and published on the University's website, and it has been vetted by Payroll and approved by the Chancellor's Office. ³
<input type="checkbox"/>	The hospitality is not a gift of state funds.
<input type="checkbox"/>	If the hospitality contains participant incentives, it should not be less than \$10 and not exceed a value of \$50 (for grants, please see hospitality guidelines).
<input type="checkbox"/>	The hospitality expenses will later be reviewed against the initial form to ensure there is not a material difference.

¹ See Guidelines for expense matrix

² See Matrix for Approval Matrix and for Academic Affairs see [AA Resource Page](#)

³ See Hospitality and Gift Card Guidelines for taxable reporting for employees and students

Please feel free to email questions to hospitality@csusm.edu

Blanket Hospitality: Items to review and confirm when requesting a blanket hospitality form

<input type="checkbox"/>	The blanket form is for a specific set of recurring events and not a general department annual approval.
<input type="checkbox"/>	The events are infrequent (limited to no more than twelve times per year, per group).
<input type="checkbox"/>	The form contains a detailed description of the events, including dates, attendees, budget, and purpose.
<input type="checkbox"/>	The budget and number of events demonstrate that they are within the per-person limits. Providing a budget for food/beverage with the number of participants to derive at a per person limit will help to ensure the hospitality is approved.
<input type="checkbox"/>	The blanket form does not exceed a time frame of more than one year and does not cross fiscal years.