

# CSUSM Corporation Gift Card Request

Form walkthrough

## Requesting gift cards

<p>1. Start from the <a href="#">CSUSM Corporation Gift Card web page</a></p>	<p><a href="#">HOME</a> // <a href="#">Business Services &amp; Finance</a> // <a href="#">Procurement &amp; Contracts</a> // <a href="#">Giftcards</a></p> <h1>Gift Cards</h1> <h2>Gift Card Procedure</h2>
<p>2. Click the Gift Card Request Form button to begin your request.</p>	<h3>Gift Card Request Form</h3> <p>The requestor will submit the <a href="#">Gift Card Request Form</a> at least ten (10) days prior to the purchase of the cards. request is approved, the purchasing process can take more time than expected, especially for larger quantities. Start the process early to avoid delays in approval or purchasing.</p> <p><a href="#">Gift Card Request Form</a></p>
<p>3. Choose the appropriate purpose for this purchase.</p>	<p>1. Purpose of Gift Card * </p> <ul style="list-style-type: none"><li><input type="radio"/> Employee/Student Recognition</li><li><input type="radio"/> Retirement Gift</li><li><input type="radio"/> Opportunity Drawing</li><li><input type="radio"/> Survey or Activity Participation/Incentive</li><li><input type="radio"/> <input type="text" value="Other"/></li></ul>
<p>4. Enter a detailed description of the purpose of this gift card purchase.</p> <p><i>Failure to provide sufficient detail may be grounds for the request being rejected.</i></p>	<p>Purpose Details *</p> <p><i>Please be as detailed as possible, request may be rejected if there is not enough detailed information provided. Note: Gift Cards should be infrequent and cannot be used to compensate employees, independent contractors, volunteers, or other individuals for services/work performed</i></p> <p><input type="text" value="Enter your answer"/></p>

<p>5. Enter a detailed explanation of how this purchase supports the mission of CSUSM &amp; CSUSM Corporation.</p> <p><i>Failure to provide sufficient detail may be grounds for the request being rejected.</i></p>	<p>How does this gift card support the mission of CSUSM and/or CSUSM Corporation? *</p> <p><i>Please be as detailed as possible, request may be rejected if there is not enough detailed information provided.</i></p> <div data-bbox="444 262 1502 378" style="border: 1px solid black; padding: 5px; min-height: 55px;"> <p>Enter your answer</p> </div>
<p>6. Enter the date or dates when the cards will be distributed.</p> <p>These dates must be within 30 dates of when this request is submitted. If you intend to distributed gift cards further that 30 days out you will need to wait and complete a separate request.</p>	<p>Date(s) of Distribution *</p> <p><i>Please list all dates that apply. Must be within 30 days of Request Approval.</i></p> <div data-bbox="438 701 1503 758" style="border: 1px solid black; padding: 5px;"> <p>10/31/20</p> </div>
<p>7. Enter the names if who will purchase and distribute the gift cards, if it is not the person submitting this request.</p>	<p>5. Name of purchaser (if different from requester)</p> <div data-bbox="464 980 1497 1037" style="border: 1px solid black; padding: 5px; min-height: 27px;"> <p>Enter your answer</p> </div> <p>6. Name of person distributing cards (if different from requester)</p> <div data-bbox="464 1194 1497 1251" style="border: 1px solid black; padding: 5px; min-height: 27px;"> <p>Enter your answer</p> </div>
<p>8. Enter the CSUSM email address of the supervisor of the project for these gifts cards. If you are the supervisor of the project, enter your one-up supervisor.</p> <p>Please check the email for accuracy/spelling. Email typos are one of the top reasons for forms being delayed, if you typo here you will need to re-submit the whole form.</p>	<p>7. Please enter the email address for your supervisor: *</p> <p><i>NOTE: Must be complete email address including <a href="mailto:csusm.edu">@csusm.edu</a></i></p> <div data-bbox="464 1379 1497 1436" style="border: 1px solid black; padding: 5px; min-height: 27px;"> <p>Enter your answer</p> </div>

<p>9. Indicate whether you have fiscal authority.</p> <p>If you do not have fiscal authority, on the next screen you will be asked to enter the email address of the person who has fiscal authority.</p>	<p>Does your supervisor have fiscal authority for this project? *</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p> <p>9. Please enter the email address for the person who has fiscal authority for this project? *</p> <p><i>NOTE: Must be complete email address including @csusm.edu</i></p> <p><input type="text" value="Enter your answer"/></p>
<p>10. Enter the names of the individuals who will receive the gift cards.</p> <p>For convenience, you can attach a list of names during the signing process.</p>	<p>10. Recipient Names *</p> <p><i>If known. Names must be included in the recipient log submitted within 10 days of final card distribution.</i></p> <p><input type="text" value="Enter your answer"/></p>
<p>11. Indicate how the card recipients are related to campus.</p>	<p>11. Recipient Relationship to Campus *</p> <p><i>Gift cards may not be purchased to pay/compensate employees, student employees, independent contractors, volunteers, or other individuals for services/work performed</i></p> <p><input type="radio"/> Staff</p> <p><input type="radio"/> Faculty</p> <p><input type="radio"/> Student</p> <p><input type="radio"/> Community Member</p> <p><input type="radio"/> Volunteer</p> <p><input type="radio"/> <input type="text" value="Other"/></p>
<p>12. Indicate whether you will be using an OSP (85xxx) Project for funding, or conducting research on human subjects.</p>	<p>Will you be using an 85xxx project number or conducting research on human subjects? *</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p>

13. (Only applicable if you are using an OSP Project or performing human subject research)

Enter the email address of your Sponsored Project Analyst.

Enter the relevant IRB Net # for your project, and attach you IRB Approval.

Contact your SPA if you have questions about IRB documents and requirements.

13. For 85xxx projects, enter the SPA's email address \*

*NOTE: Must be complete email address including @[csusm.edu](mailto:csusm.edu)*

*Please enter the email address only for the SPA.*

SPA Email Addresses:

[cobermiller@csusm.edu](mailto:cobermiller@csusm.edu)

[kaskew@csusm.edu](mailto:kaskew@csusm.edu)

[tbeckwith@csusm.edu](mailto:tbeckwith@csusm.edu)

[zweaver@csusm.edu](mailto:zweaver@csusm.edu)

Enter your answer

14. IRB Net # \*

Enter your answer

15. Please upload your IRB Approval (Non-anonymous question ?) \*

*An IRB must be uploaded. Please contact your SPA if you have any questions.*

 Upload file

File number limit: 1 Single file size limit: 100MB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

14. Enter the accounting chartfield where the gift card purchase will be charged.

### Chargeback Info

The chartfield entered below will be charged the cost of the gift cards.

Account# \*

Enter 6 Digits

660003

Fund# \*

Enter 5 Digits

92001

Department # \*

Enter 4 Digits

1330

Project # \*

Enter 5 Digits

81500

Class

Enter 5 Digits

Enter your answer

15. Indicate whether this gift card purchase passes the threshold for additional CORP approvals.

If your request requires an exemption per CSUSM Corporation Gift Card Procedure, you must submit an exemption memo and receive approval before submitting this request. For more information on exemption

For 81xxx and 86xxx projects: Are any of the gift cards you are purchasing over \$50 or is the total of all the cards being purchased over \$300? \*

Yes

No

Do you have an approved exemption for this request? (All exemptions must be approved via memo before submitting this form.

For more information on the exemption process, visit the CSUSM Corporation Gift Card webpage. You will be asked to attach your approved exemption during the signing portion of this request.) \*

Yes

No

<p>requirements see the <a href="#">CSUSM Corporation Gift Card web page</a>.</p>	
<p>16. Enter the details of the gift cards you intend to purchase:</p> <p>Vendor: What company can the gift cards be redeemed at? <i>Ex: Walmart, Amazon, CSUSM Bookstore, etc.</i></p> <p>Number of Cards: How many cards for this vendor and this dollar amount will you be purchasing?</p> <p>Dollar Value: How much money will be loaded onto each individual card?</p> <p>If you need to enter gift cards with different amounts or different vendors, choose "Yes" and repeat this process as needed.</p>	<p><b>Gift Card Details</b></p> <p>Departments should make an attempt to purchase Gift Cards from CSUSM Corporation partners (ex. Follett and Sodexo). Visit <a href="https://www.csusm.edu/corp/commservices/index.html">https://www.csusm.edu/corp/commservices/index.html</a> for a complete list of partners.</p> <p>19. Gift Card Vendor *</p> <div data-bbox="467 430 1507 487" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">       Enter your answer     </div> <p>20. Number of Cards *</p> <div data-bbox="467 646 1507 703" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">       The value must be a number     </div> <p>21. Dollar Value of Each Card *</p> <p><i>Dollar value for each card must be the same. If you have cards that are different values, but from the same vendor, please choose "Yes" from the question below and enter the card details on the next screen.</i></p> <div data-bbox="467 926 1507 982" style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">       The value must be a number     </div> <p>22. Do you have any other gift cards from any other vendors or gift cards of a different value from the same vendor? *</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>
<p>17. Enter any additional notes or comments as needed</p>	<p>23. Additional Comments/Notes </p> <div data-bbox="474 1333 1500 1444" style="border: 1px solid #ccc; padding: 10px; min-height: 50px;">       Enter your answer     </div>
<p>18. By checking this box you acknowledge that you are familiar with the requirements of the <a href="#">CSUSM Cash Handling Policy</a> and will store and handle these gift cards as though they were cash.</p>	<p>I acknowledge that I will keep possession of the cards in a secure location in accordance with the CSUSM Cash Handling Policy until distributed. *</p> <p><input type="radio"/> Acknowledge</p>

19. By checking this box you acknowledge that you are familiar with the [CSUSM Corporation Gift Card Purchasing Procedures](#) and will abide by them.

As specified in the Gift Card Purchasing Procedures, failure to follow these procedures and all other CSUSM Corporation policies and procedures may lead to consequences including recovery of card cost, suspension of ProCard, disciplinary action and/or dismissal.

I certify that this gift card complies with the CSUSM Corporation Gift Card Purchasing Procedures. I understand that failure to follow these procedures and all other CSUSM Corporation policies and procedures may lead to consequences including recovery of card cost, suspension of ProCard, disciplinary action and/or dismissal. \*

Acknowledge

20. Upon submitting your request, the system will generate the form and submit it through the AdobeSign system for routing.

 Thanks!

Thank you for submitting your Gift Card Request. Your request has been sent for approval.

21. The requestor will receive an email to open the form in the AdobeSign system and review that all information is accurate before sending it on for approvals.

If any attachments are needed (such as IRB documentation or Exemption Memo), the requestor must upload them now before sending the form on for approvals.

## Information requested on "178-Gift Card Request-Justin Cox"



Flow CSUSM Corporation Bot <echosign@echosign.com>  
To Justin Cox

Reply

Reply

If there are problems with how this message is displayed, click here to view it in a web browser.



California State University  
SAN MARCOS

Flow CSUSM Corporation Bot requests your information on  
**178-Gift Card Request-Justin Cox**

Due on January 3, 2021

[Review and fill out](#)

Please review and complete this gift card request from Justin Cox

**FLOW CSUSM CORPORATION BOT**  
[flowccorpbot@csusm.edu](mailto:flowccorpbot@csusm.edu)

After you fill **178-Gift Card Request-Justin Cox**, the agreement will be sent to **Justin Cox, Justin Cox, Justin Cox** and **Justin Cox**. Then, all parties will receive a final PDF copy by email. As you prepare to sign this agreement, please note that the document asks for the following documents to be attached:

- IRB Document (If Applicable)
- Exemption Approval (If Applicable)

**Don't forward this email:** If you don't want to fill, you can [delegate](#) to someone else.



# CSUSM GIFT CARD REQUEST FORM

Date: 10/5/2020  
Request ID: 178

### Requestor Details

Name: Justin Cox

Department: CSUSM Corporation

Email: jcox@csusm.edu

### Purpose

Purpose of Gift Card: Employee/Student Recognition

Purpose Details:

TEST

### Recipient

Relationship to Campus: Staff

Recipient Names: TEST

Distribution Dates: 10/31/20

Name of Purchaser:  
(if different from requestor)

Name of Person Distributing Cards:  
(if different from requestor)

### Gift Card Details

Gift Card Vendor	Number of Cards	Dollar Value of Each Card
Sam Goody	2	7
Total		14.000000000000

Chargeback Information:	Account	Fund	Department	Project	Class
	660003	92001	1330	81500	

IRB Net # (If applicable): 5555555

Attach IRB Document (If applicable):

22. Approvers will receive an email to approve using the standard AdobeSign process.

If the approver chooses to decline to approve, they are required to type a reason for their rejection.

### Approval requested on "178-Gift Card Request-Justin Cox"



Flow CSUSM Corporation Bot <echosign@echosign.com>  
To Justin Cox

[Reply](#) [Reply All](#)

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



California State University  
SAN MARCOS

Flow CSUSM Corporation Bot requests your approval on  
**178-Gift Card Request-Justin Cox**

Due on January 3, 2021

[Review and approve](#)

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Please review and complete this gift card request from Justin Cox

**FLOW CSUSM CORPORATION BOT**  
[flowccorpbot@csusm.edu](mailto:flowccorpbot@csusm.edu)

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After you approve **178-Gift Card Request-Justin Cox**, the agreement will be sent to **Justin Cox, Justin Cox** and **Justin Cox**. Then, all parties will receive a final PDF copy by email.

**Don't forward this email:** If you don't want to approve, you can [delegate](#) to someone else.

23. If your form is rejected by any approvers, you will receive an email notification including any Reason information entered by the approver.

## Gift Card Request Rejected- ID: 177



Microsoft Power Apps and Power Automate <micros  
To Justin Cox

[Click here to download pictures.](#) To help protect your privacy, Outlook pre

Hello ,

Your Gift Card Request was denied by Justin Cox

Here are the comments left by the reviewer: TEST FORM, REJECTING