

## CSU San Marcos Hospitality Approver Quick Reference Guide

The purpose of this guide is to assist the person approving hospitality to determine that the hospitality expense is appropriate and evaluate the importance of the event in terms of the costs that will be incurred, the benefits to be derived from such an expense, the availability of funds, and any alternatives that would be equally effective in accomplishing the desired objectives.

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 approving a hospitality form	
<input type="checkbox"/>	The hospitality is necessary and serves a direct or indirect benefit to the University.
<input type="checkbox"/>	The hospitality expense is appropriate to the occasion and serves a bona fide business purpose.
<input type="checkbox"/>	The hospitality expense is allowable per <a href="#">CSU Policy</a> .
<input type="checkbox"/>	The hospitality expense is allowable within the <a href="#">CSUSM Guidelines</a> .
<input type="checkbox"/>	The funding source is appropriate to the type of hospitality expense. <sup>1</sup>
<input type="checkbox"/>	A <u>detailed</u> description of the expense is provided, and all the required supporting documentation is attached.
<input type="checkbox"/>	You are not approving your own expenses or those of your supervisor (exception is the CFO approving the President).
<input type="checkbox"/>	The Hospitality Level I or Level II approving authority is not also 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 and it serves a bona fide business purpose and not personal benefit nor is it for convenience, e.g. 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. <sup>2</sup>
<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. <sup>3</sup>
<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. <sup>3</sup>
<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.

<sup>1</sup> See Guidelines for expense matrix

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

<sup>3</sup> See Hospitality and Gift Card Guidelines for taxable reporting for employees and students

Please feel free to email questions to [hospitality@csusm.edu](mailto:hospitality@csusm.edu)