



Procure-to-Pay (P2P) Form Request Fields

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Good and Services Request

Question Page: General Information

Question Text	Response Type	Response Options	Conditionally Visible Based on
What type of goods or services are you requesting?	Dropdown List (Pick One)	Goods - Other Services - Other Classroom or Laboratory Supplies Equipment Furniture Marketing or Branded Items Transportation Charters Legal Services Drone Vehicles	
Is this a Blanket Order?	Yes/No		
Is the request for a renewal of a previous purchase?	Yes/No		
If available, provide the previous purchase order (PO) number.	Text (Single Line)		Is the request for a renewal of a previous purchase?
Does the request include performance terms (start & end date)?	Yes/No		
Performance Start Date	Date		Does the request include performance terms (start & end date)?
Performance End Date	Date		Does the request include performance terms (start & end date)?
Does the product include a standard or extended warranty?	Yes/No		What type of goods or services are you requesting?
Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?	Multiple Choice (Pick One)	No Yes, Sole Source Yes, Sole Brand	
Briefly describe why the requested item(s) or service is needed.	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?

What are the unique performance features of the product or service that are not available in any other product/brand or provider?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Why are the unique product features or the unique abilities of the vendor REQUIRED?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What other products or providers have been evaluated, rejected and why?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Is the product needed to match other product(s) previously purchased through a competitive process?	Yes/No		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
If yes, provide details below.	Text (Single Line)		Is the product needed to match other product(s) previously purchased through a competitive process?

Question Page: Drone (only visible if [What type of goods or services are you requesting?] answered as Drone)

Question Text	Response Type	Response Options	Conditionally Visible Based on
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		What type of goods or services are you requesting?

Question Page: Equipment (only visible if [What type of goods or services are you requesting?] answered as Equipment)

Question Text	Response Options	Response Options	Conditionally Visible Based on

What type of Equipment Request is this?	Multiple Choice (Pick One)	Equipment Lease & Rental Equipment Maint & Repair Instructional Equipment non-Instructional Equipment	
Is the equipment request for an on-campus location?	Yes/No		
Provide the building and room number of the on-campus location.	Text (Single Line)		Is the equipment request for an on-campus location?
Provide the full address of the off-campus location including suite or room number.	Text (Single Line)		Is the equipment request for an on-campus location?
When will the equipment be delivered? Note: an estimate is sufficient.	Date		
Does the maintenance & repair of the equipment include parts?	Yes/No		What type of Equipment Request is this?
Is the equipment new or used?	Multiple Choice (Pick One)	New Used	
Does the equipment or its components require additional handling? Examples: Complex electrical wiring, items requiring specialize equipment for delivery, or any installation activities that alters or impacts the building.	Yes/No		

Have prior communications and/or arrangements been made with your campus Facilities and/or Capital Planning departments?	Yes/No		Does the equipment or its components require additional handling? Examples: Complex electrical wiring, items requiring specialize equipment for delivery, or any installation activities that alters or impacts the building.
Does the equipment require insurance?	Yes/No		
Please provide the justification for the request including the intended use. If justification is larger than 2000 characters, type in "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		

Question Page: Furniture (only visible if [What type of goods or services are you requesting?] answered as Furniture)

Question Text	Response Type	Response Options	Conditionally Visible Based on
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		
Is the furniture request for an on-campus location?	Yes/No		
Provide the building and room number of the on-campus location.	Text (Single Line)		Is the furniture request for an on-campus location?
Provide the full address of the off-campus location including suite or room number.	Text (Single Line)		Is the furniture request for an on-campus location?
When will the furniture be delivered?	Date		

Does the furniture or its components require additional handling? Examples: items requiring specialize equipment for delivery.	Yes/No		
Does the furniture request require services (installation, wiring, or an additional services)?	Yes/No		
Have prior communications and/or arrangements been made with your campus Facilities and/or Capital Planning departments?	Yes/No		Does the furniture or its components require additional handling? Examples: items requiring specialize equipment for delivery.

Question Page: Classroom or Laboratory Supplies (only visible if [What type of goods or services are you requesting?] answered as Classroom or Laboratory Supplies)

Question Text	Response Type	Response Options	Conditionally Visible Based on
What type of laboratory or classroom supply is being requested?	Multiple Choice (Pick One)	Cadavers Chemicals Compressed Gas Cylinders Hazardous Materials Live Animals Pharmaceuticals Other Laboratory or Classroom Supplies	
Provide the Institutional Animal Care and Use Commit (IACUC) Approval No.	Text (Single Line)		What type of laboratory or classroom supply is being requested?
If Other Laboratory or Classroom Supplies, provide additional details.	Text (Single Line)		What type of laboratory or classroom supply is being requested?
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the requisition.	Text (Multi-Line)		

Question Page: Marketing & Branded Item Details (only visible if [What type of goods or services are you requesting?] answered as Marketing & Branded Item Details)

Question Text	Response Type	Response Options	Conditionally Visible Based on
What type of marketing or branded item is this for?	Multiple Choice (Pick One)	Advertising Lead Generation Printing Services Web Services Other	
Provide information about the department, club or organization the marketing or branded item is for including group name and contacts within the group.	Text (Multi-Line)		
What is the intended use of the marketing or branded item? Check all that apply.	Multiple Select (Pick Many)	Employee or Organization use Fundraiser Promotional Giveaway Other	

If Other, provide the details of the intended use of the marketing or branded items.	Text (Single Line)		What is the intended use of the marketing or branded item? Check all that apply.
Does the request include the use of an approved campus or CSU name, logo, or brand?	Yes/No		
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		
Is the purchase from supplier licensed by the University through the Collegiate Licensing Company?	Yes/No		
Are you requesting exemption from royalties for the marketing or branded item? Note: items not approved for exemption can still be produced and purchase with royalties applied	Yes/No		

Question Page: Vehicles (only visible if [What type of goods or services are you requesting?] answered as Vehicles)

Question Text	Response Type	Response Options	Conditionally Visible Based on
GROUP: General Vehicle Details	Group of Questions		
What kind of vehicle request is this?	Multiple Choice (Pick One)	Lease or rent a vehicle Purchase a vehicle Vehicle Maintenance/Repair - Services Vehicle Maintenance/Repair - Parts Vehicle Maintenance/Repair - Other	
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		
Is this an alternative fuel vehicle?	Yes/No		

GROUP: Vehicle Purchase Details			What kind of vehicle request is this?
Are you purchasing a new vehicle or a used vehicle?	Multiple Choice (Pick One)	New Used	
Does the vehicle need to be insured?	Yes/No		
Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?	Multiple Choice (Pick One)	Adding vehicle into campus inventory Replacing an existing vehicle	
Provide the purpose of use for the vehicle including how and where the vehicle will be used, number of trips and/or mileage incurred annually.	Text (Multi-Line)		
Provide a listing of fleet vehicles belonging to or accessible to the requesting department and/or unit. If there are no vehicles available, input none.	Text (Multi-Line)		
Provide details for the type of use of the vehicles (on road, off-road, low speed, etc.).	Text (Single Line)		
Provide the type of vehicle request or performance specifications required to meet the need described in the justification.	Text (Multi-Line)		
Statement of how the proposed purchase supports CSU's policy to encourage and promote the use of alternative transportation and/or alternative fuels to reduce CHG emissions related to university associated transportation, including commuter and business travel and an evaluation of lower-carbon transportation alternative evaluated.	Text (Multi-Line)		Is this an alternative fuel vehicle?
Property No. or Asset ID	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle No.	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?

Vehicle License No.	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle Year	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle Make	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle Model	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle Current Mileage	Text (Single Line)		Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?
Vehicle Location	Multiple Choice (Pick One)	On Campus Off Campus	Are you adding a vehicle into the campus vehicle inventory or replacing an existing vehicle?

Question Page: Transportation Charters (only visible if [What type of goods or services are you requesting?] answered as Transportation Charters)

Question Text	Response Type	Response Options	Conditionally Visible Based on
Please provide the justification for the request. If justification is larger than 2000 characters, type in "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		

Question Page: Legal Services (only visible if [What type of goods or services are you requesting?] answered as Legal Services)

Question Text	Response Type	Response Options	Conditionally Visible Based on
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		

Question Page: Other Goods and Services (only visible if [What type of goods or services are you requesting?] answered as Other Goods and Services)

Question Text	Response Type	Response Options	Conditionally Visible Based on
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		What type of goods or services are you requesting?
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		What type of goods or services are you requesting?

Question Page: Cost Details

Question Text	Response Type	Response Options	Conditionally Visible Based on
Quotes & Other Attachments	Grouping		
Do you have documentation to attach?	Yes/No		
Drone Cost Details			
Drone Cost Details	Cost/Pricing Details		What type of goods or services are you requesting?
Equipment Cost Details			
Equipment Lease & Rental Cost Details	Cost/Pricing Details		What type of Equipment Request is this?
Equipment Maintenance or Repair - Service Cost Details	Cost/Pricing Details		Does the maintenance & repair of the equipment include parts?
Equipment Maintenance or Repair - Part Cost Details	Cost/Pricing Details		What kind of vehicle request is this?

Instructional Equipment Cost Details	Cost/Pricing Details		What type of Equipment Request is this?
Non-Instructional Equipment Cost Details	Cost/Pricing Details		What type of Equipment Request is this?
Furniture Cost Details			
Furniture Details	Cost/Pricing Details		What type of goods or services are you requesting?
Furniture Services Details	Cost/Pricing Details		Does the furniture request require services (installation, wiring, or an additional services)?
Laboratory or Classroom Cost Details			
Chemical Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Live Animals Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Cadaver Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
HazMat Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Pharmaceuticals Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Other Laboratory or Classroom Supply Cost Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Compressed Gas Cylinders Details	Cost/Pricing Details		What type of laboratory or classroom supply is being requested?
Marketing or Branded Item Cost Details			
Advertising Cost Details	Cost/Pricing Details		What type of marketing or branded item is this for?

Printing Services Cost Details	Cost/Pricing Details		What type of marketing or branded item is this for?
Lead Generation Cost Details	Cost/Pricing Details		What type of marketing or branded item is this for?
Web Services Cost Details	Cost/Pricing Details		What type of marketing or branded item is this for?
Other Marketing or Branded Item Cost Details	Cost/Pricing Details		What type of marketing or branded item is this for?
Vehicle Cost Details			
Vehicle Lease or Rental Cost Details	Cost/Pricing Details		What kind of vehicle request is this?
Vehicle Maintenance or Repair - Service Cost Details	Cost/Pricing Details		What kind of vehicle request is this?
Vehicle Maintenance or Repair - Part Cost Details	Cost/Pricing Details		What kind of vehicle request is this?
Vehicle Maintenance or Repair - Other Cost Details	Cost/Pricing Details		What kind of vehicle request is this?
Vehicle Cost Details	Cost/Pricing Details		What kind of vehicle request is this?
Legal Services			
Legal Services Details	Cost/Pricing Details		What type of goods or services are you requesting?
Transportation Charters Details			
Transportation Charters Cost Details	Cost/Pricing Details		What type of goods or services are you requesting?
Goods - Other			
Goods - Other Cost Details	Cost/Pricing Details		What type of goods or services are you requesting?
Services - Other			
Services - Other Cost Details	Cost/Pricing Details		What type of goods or services are you requesting?

IT Hardware Request

Question Page: General IT Hardware Information

Question Text	Response Type	Response Options	Conditionally Visible Based on
Quotes & Other Attachments	Grouping		
Request Type	Dropdown List (Pick One)	New Acquisition Repeat Requisition	
Name of IT Product	Text (Single Line)		
Do you have a Campus IT Request Number/ITPR?	Yes/No		
If yes, please provide the Campus IT Request Number/ITPR?	Text (Single Line)		Do you have a Campus IT Request Number/ITPR?
IT Product Type	Multiple Choice (Pick One)	Hardware Accessories or Supplies Other	
If other, provide details of the IT Hardware Request.	Text (Multi-Line)		IT Product Type
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.	Text (Multi-Line)		
List alternative product options that were considered and why those alternatives were rejected. If none, input N/A	Text (Multi-Line)		
Does the product include either a standard or extended warranty?	Yes/No		
Provide the details of the warranty.	Text (Multi-Line)		Does the product include either a standard or extended warranty?
Is training required to implement or use the product?	Yes/No		
Provide any available supplier links for product details, technical details or accessibility information.	Text (Multi-Line)		
Sole Source or Brand	Grouping		
Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?	Multiple Choice (Pick One)	No Yes, Sole Source Yes, Sole Brand	

What are the unique performance features of the product or service that are not available in any other product/brand or provider?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Why are the unique product features or the unique abilities of the vendor REQUIRED?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What other products or providers have been evaluated, rejected and why?	Text (Multi-Line)		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Is the product needed to match other product(s) previously purchased through a competitive process?	Yes/No		Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
If yes, provide details below.	Text (Single Line)		Is the product needed to match other product(s) previously purchased through a competitive process?

Question Page: Cost Details

Question Text	Response Type	Response Options	Conditionally Visible Based on
IT Hardware Cost Details	Grouping		
Do you have documentation to attach?	Yes/No		
Accessories/Supplies Details	Cost/Pricing Details		IT Product Type
Hardware Details	Cost/Pricing Details		IT Product Type
Other IT Hardware Details	Cost/Pricing Details		IT Product Type

IT Software Request

Question Page: General IT Software Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
Product or Service Details	Grouping		
Request Type	New Acquisition Repeat Acquisition	Dropdown List (Pick One)	
Name of IT Product or Service		Text (Single Line)	
Do you have a Campus IT Request Number/ITPR?		Yes/No	
If yes, please provide the Campus IT Request Number/ITPR?		Text (Single Line)	Do you have a Campus IT Request Number/ITPR?
IT Product or Service Type	Cloud Service Maintenance Software Web site Other	Multiple Choice (Pick One)	
If Other, provide details for the IT Software Request.		Text (Multi-Line)	IT Product or Service Type
Will the item be obtained electronically?		Yes/No	IT Product or Service Type
For the requested items(s), briefly describe why it is needed, what it is, what it does, and its intended use.		Text (Multi-Line)	
Software or Cloud Service Details	Grouping		
Is the software requested subscription based?		Yes/No	
If yes, select the appropriate subscription type.	Monthly Subscription Yearly Subscription Multi-Year Subscription Other	Multiple Choice (Pick One)	Is the software requested subscription based?
You selected Other as the subscription type. Please describe		Text (Multi-Line)	If yes, select the appropriate subscription type.

Does the licensing model support a separate Development, Test, and Production environment model without additional costs for Dev/Test environment licenses?	Yes No (please describe below) Not Applicable	Dropdown List (Pick One)	
If no, please describe below.		Text (Multi-Line)	Does the licensing model support a separate Development, Test, and Production environment model without additional costs for Dev/Test environment licenses?
Sole Source	Grouping		
Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?	No Yes, Sole Source Yes, Sole Brand	Multiple Choice (Pick One)	
Briefly describe why the requested item(s) or service is needed.		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What are the unique performance features of the product or service that are not available in any other product/brand or provider?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Why are the unique product features or the unique abilities of the vendor REQUIRED?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What other products or providers have been evaluated, rejected and why?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?

Is the product needed to match other product(s) previously purchased through a competitive process?		Yes/No	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
If yes, provide details below.		Text (Single Line)	Is the product needed to match other product(s) previously purchased through a competitive process?

Question Page: Information Security

Question Text	Response Options	Response Type	Conditionally visible based on which question
Will the product/service interact with any campus application or system?		Yes/No	
Will the product/service collect, transport, store and/or analyze/process campus data?		Yes/No	
What is the highest (e.g. most sensitive) level of data this product/service will handle?	Level 1 Level 2 Level 3 No Sensitive Data	Dropdown List (Pick One)	Will the product/service collect, transport, store and/or analyze/process campus data?
What type of users will utilize the product or service?	Public Students Staff Faculty	Multiple Select (Pick Many)	
Do users require access from off-campus?		Yes/No	
Will IT staff be needed to implement this software?		Yes/No	

Is the product/service hosted off-site? (outsourced or "cloud hosted")	Yes - all aspects of the product/service are off-site No, the product/service is entirely hosted by the campus (e.g AWS) Both - Some aspects of the product/service are off-site, others are hosted at the campus	Dropdown List (Pick One)	
Does the product act as a server or accept inbound network information?		Yes/No	
Will the software need data from any campus systems/applications?		Yes/No	
How many users will utilize the product or service?		Text (Single Line)	

Question Page: Additional Supplier Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
Provide the supplier website for the product or service		Text (Single Line)	
Supplier Contact Name		Text (Single Line)	
Supplier Contact Department/Title		Text (Single Line)	
Supplier Contact Email		Text (Single Line)	
Supplier Contact Phone		Text (Single Line)	

Question Page: Cost Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Quotes & Other Attachments	Grouping		
Do you have documentation to attach?		Yes/No	
IT Software or Maintenance Details	Grouping		
Maintenance Details		Cost/Pricing Details	IT Product or Service Type
Software Details		Cost/Pricing Details	IT Product or Service Type
Website Cost Details		Cost/Pricing Details	IT Product or Service Type
Other IT Software Cost Details		Cost/Pricing Details	IT Product or Service Type

Independent Contractor Request

Question Page: Request Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
Request Details	Grouping		
Select one of the following Independent Contractor type.	Guest Speaker or Lecturer Individual Providing Service to the Campus and/or Auxiliary	Multiple Choice (Pick One)	
Service Start Date		Date	
Service End Date		Date	
Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?	No Yes, Sole Source Yes, Sole Brand	Multiple Choice (Pick One)	
Briefly describe why the requested item(s) or service is needed		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What are the unique performance features of the product or service that are not available in any other product/brand or provider?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Why are the unique product features or the unique abilities of the vendor REQUIRED?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
What other products or providers have been evaluated, rejected and why?		Text (Multi-Line)	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
Is the product needed to match other product(s) previously purchased through a competitive process?		Yes/No	Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND?
If yes, provide details below.		Text (Single Line)	Is the product needed to match other product(s) previously purchased through a competitive process?

Guest Speaker or Lecturer Details	Grouping		
Is the engagement with the Guest Speaker or Lecturer a one time engagement?		Yes/No	
Provide the number of engagements with the Guest Speaker or Lecturer.		Text (Single Line)	Is the engagement with the Guest Speaker or Lecturer a one time engagement?
Does the engagement with the Guest Speaker or Lecture include any travel related activities?		Yes/No	
Provide the details and/or justification of the request. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.		Text (Multi-Line)	
Independent Contractor Details	Grouping		
Provide details of proposed services including: detailed scope, deliverables, travel (if any), and purpose of the service (Who, what, when, where, how and why). If the details are greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.		Text (Multi-Line)	
Is the engagement with the Contractor a one time engagement?		Yes/No	
Provide the number of engagements with the Contractor.		Text (Single Line)	Is the engagement with the Contractor a one time engagement?
Does the engagement with the Contractor include any travel related activities?		Yes/No	

Does the contractor primarily engage in an independently establish trade, occupation, profession or business?		Yes/No	
If yes, provide the license number and website. Upload any documentation that supports the contractor's established trade occupation, profession or business. Upload files as internal attachments on the Requisition.		Text (Multi-Line)	Does the contractor primarily engage in an independently establish trade, occupation, profession or business?
Will work be performed on University property?		Yes/No	
Will the work be performed in the state of California?		Yes/No	Will work be performed on University property?
If yes, provide the details of the location including address and room/suite number.		Text (Single Line)	Will the work be performed in the state of California?

Question Page: Questionnaire

Questionnaire	Grouping		
Is the contractor currently employed by another State agency or CSU?		Yes/No	
Did the contractor retire/separate from the CSU fewer than 2 (two) years ago?		Yes/No	
Was contractor previously employed by CSU in a policy making position or an MPP?		Yes/No	
Will the contractor participate in the process of planning, negotiations, transaction, or any part of the decision making process?		Yes/No	
Provide describe how the contractor will participate in the decision making process.		Text (Multi-Line)	Will the contractor participate in the process of planning, negotiations, transaction, or any part of the decision making process?

Will the contractor be hiring or supervising university / auxiliary employees?		Yes/No	
Please describe the tasks and/or activities where supervision is required outside of the current CSU Management Personnel.		Text (Multi-Line)	Will the contractor be hiring or supervising university / auxiliary employees?
Will the contractor perform work with minors?		Yes/No	
Will the contractor require access to PeopleSoft?		Yes/No	
Does the contractor represent themselves as an independent contractor (advertising, website, business cards, etc.)?		Yes/No	
Will the contractor be required to comply with the university/auxiliary provided instructions about when, where, and how to work?		Yes/No	
Is the work to be performed a regular part of university / auxiliary business/work?		Yes/No	
If yes, provide a written justification for the outsourced work required. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.		Text (Multi-Line)	Is the work to be performed a regular part of university / auxiliary business/work?
Does the department or another department on campus have employees performing the same, or similar, functions?		Yes/No	
If yes, please provide the Department Name, Employee(s) Name, and justification for the outsourced work. If the justification is greater than 2,000 characters, enter "See Attached" and upload your justification as an internal attachment on the Requisition.		Text (Multi-Line)	
Can the contractor terminate their relationship without incurring a liability for failure to complete the job?		Yes/No	

Will the contractor be able to hire and pay their own assistants?		Yes/No	
Will the contractor be allowed to work concurrently for other organizations/clients while working for the university / auxiliary?		Yes/No	
Will the contractor be able to determine their own hours and priorities?		Yes/No	
Will the contractor provide their own tools or materials?		Yes/No	
Nepotism	Grouping		
Does the contractor have an immediate family member as defined in the Nepotism Policy employed by California State University or the campus?		Yes/No	
If yes, please provide the name and relationship.		Text (Multi-Line)	Does the contractor have an immediate family member as defined in the Nepotism Policy employed by California State University or the campus?
Does the relationship between the contractor and immediate family member present a conflict?	Yes, there is a conflict No, there is no conflict	Dropdown List (Pick One)	Does the contractor have an immediate family member as defined in the Nepotism Policy employed by California State University or the campus?
If yes, please elaborate below and a representative from Human Resources/Faculty Affairs will follow up with the contractor to discuss how to best handle.		Text (Multi-Line)	Does the relationship between the contractor and immediate family member present a conflict?
Requester Certification	Grouping		
I hereby declare that the information provided in this document is true and correct and that I have sufficient knowledge of, authority, and responsibility for the work to be performed under this contract.		Confirm (Single Checkbox)	

Question Page: Cost Details

Quotes & Other Attachments	Grouping		
Do you have documentation to attach?		Yes/No	
Guest Speaker or Lecturer Cost Details	Grouping		
Guest Speaker or Lecturer Cost Details		Cost/Pricing Details	
Guest Speaker or Lecturer Travel Cost Details		Cost/Pricing Details	Does the engagement with the Guest Speaker or Lecture include any travel related activities?
Independent Contractor Cost Details	Grouping		
Independent Contractor Cost Details		Cost/Pricing Details	
Independent Contractor Travel Cost Details		Cost/Pricing Details	Does the engagement with the Contractor include any travel related activities?

Hospitality Request (Non-Travel)

Question Page: General Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
Request Details	Grouping		
Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.	Awards Catering Entertainment Services Participation Incentive Promotional Items Team Building Activities Venue Alcohol (Additional Review Required) Other	Multiple Choice (Pick One)	
Other was selected, provide additional details about the request type.		Text (Single Line)	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Please check what type of event the request is for. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.	Award or Service Recognition Commencement Farwell / Retirement Function Fundraising Event Morale / Team Function Official Guest(s) Meeting Outreach Event Professional Conference / Meeting Student Event Student Recognition Student Recruitment Other	Multiple Choice (Pick One)	
Other was selected, provide additional details about the even type.		Text (Single Line)	Please check what type of event the request is for. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Provide details of the Business Purpose or justification for the hospitality request.		Text (Multi-Line)	
Event Details	Grouping		
Event Name		Text (Single Line)	

How many day(s) is the event?	Single Day Multiple Days - Consecutive Multiple Days - Not Consecutive	Multiple Choice (Pick One)	
Provide the Event Date.		Date	How many day(s) is the event?
Event Start Date		Date	How many day(s) is the event?
Event End Date		Date	How many day(s) is the event?
List the dates of the event.		Text (Multi-Line)	How many day(s) is the event?
Is the number of participants/group of participants more or less than 5?	more than 5 less than 5	Multiple Choice (Pick One)	
You selected less than 5, please list the names or group names, and indicate if they are Faculty, Staff, Student or Community Member.		Text (Multi-Line)	Is the number of participants/group of participants more or less than 5?
You selected more than 5, please upload a file listing the participant names or group names. Note: an available template can be used.		Confirm (Single Checkbox)	Is the number of participants/group of participants more or less than 5?
Catering Details	Grouping		
What type of meals are included for the event?		Multiple Select (Pick Many)	
Provide the cost per person for breakfast. Note: Reference the Help Text for your campus' maximums per person rates.		Text (Single Line)	What type of meals are included for the event?
Provide the cost per person for lunch. Note: Reference the Help Text for your campus' maximum per person rates.		Text (Single Line)	What type of meals are included for the event?
Provide the cost per person for dinner. Note: Reference the Help Text for your campus' maximum per person rates.		Text (Single Line)	What type of meals are included for the event?
Provide the cost per person for light refreshments. Note: Reference the Help Text for your campus' maximum per person rates.		Text (Single Line)	What type of meals are included for the event?
Does the hospitality request include alcohol?		Yes/No	

Is catering provided by CSU and/or a CSU Auxiliary?		Yes/No	
If applicable to your campus, did you receive a Catering Waiver?	Not Applicable Yes No	Dropdown List (Pick One)	Is catering provided by CSU and/or a CSU Auxiliary?
Promotional Items	Grouping		
Does the request include the use of an approved campus or CSU name, logo, or brand?		Yes/No	
Is the purchase from a supplier licensed by the University through the Collegiate Licensing Company?		Yes/No	
Are you requesting exemption from royalties for the promotional item? Note: items not approved for exemption can still be produced and purchase with royalties applied.		Yes/No	

Question Page: Cost Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Quotes & Other Attachments			
Do you have documentation to attach?		Yes/No	
Cost Details			
Catering Cost		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Award or Participation Incentive Cost Details		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Promotional Item Cost Details		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Venue Cost Details		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
Entertainment or Other Cost Details		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.

Alcoholic Beverage Cost Details		Cost/Pricing Details	Please check the Hospitality request type. Note: Refer to the CSU Hospitality Policy and/or your campus hospitality policy on what is allowable.
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Payment for Unauthorized Purchase

Question Text	Response Options	Response Type	Conditionally visible based on which question
Confirming Order Information	Grouping		
Reason/Justification for Confirming Order		Text (Multi-Line)	
Supplier Invoice Number		Text (Single Line)	
Supplier Invoice Date		Date	
Item Details	Grouping		
Item/Service Details		Cost/Pricing Details	
Attachments are required for this request.		Confirm (Single Checkbox)	

Facilities and Construction Request

Question Page: General Request Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Initial Details	Grouping		
Provide the Campus Facilities Work Order or Project Number		Text (Single Line)	
Is this request for a new or an existing facilities/capital project?	New Facilities/Capital Project Existing Facilities/Capital Project	Multiple Choice (Pick One)	
Provide the existing Project Number		Text (Single Line)	Is this request for a new or an existing facilities/capital project?
Project Manager Name		Text (Single Line)	
Project Manager Email		Text (Single Line)	
Provide a detailed description of the Scope of Work. Upload any additional Scope of Work documentation including deliverables, schedule, or project drawings as internal attachments on the Requisition.		Text (Multi-Line)	
Provide the Location for the Request		Text (Multi-Line)	
Request Details	Grouping		
Select the Facilities or Construction Service Type	Construction General Services / Installation and Supply Maintenance of State Facility or Property Professional Services (related to Public Works) Other	Multiple Choice (Pick One)	

Select the Delivery Method for the request.	Collaborative Design Build Design Build Design Bid Build DVBE/SBE Option Job Order Contract (JOC) Major Capital Major Capital - Collaborative Design & Build Major Capital - Construction Management at Risk Minor Capital Task Order Construction Agreements (TOCA) Other	Multiple Choice (Pick One)	Select the Facilities or Construction Service Type
Provide additional details for selecting Other as the Delivery Method.		Text (Multi-Line)	Select the Delivery Method for the request.
Select the service that is related to a Public Works Project.	Design Build Owner / Architect Agreement Service Agreement Systemwide Master Enablement Agreement (MEA) Task Order Service Against Master Agreement (TOSA) Construction Manager @ Risk (CM@Risk) Owner Architect Agreement Small Project Owner/Architect Agreement	Multiple Choice (Pick One)	Select the Facilities or Construction Service Type
If Other, provide additional details of the request type.		Text (Multi-Line)	Select the Facilities or Construction Service Type
Have you received quotes from contractor(s)?		Yes/No	
Does the request require any known license classification(s)?		Yes/No	
Please provide the known license classification(s).		Text (Multi-Line)	Does the request require any known license classification(s)?

Question Page: Cost Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Quotes & Other Attachments	Grouping		
Do you have documentation to attach?		Yes/No	
Item/Service Information	Grouping		
Item Cost Details		Cost/Pricing Details	
Service Cost Details		Cost/Pricing Details	

Direct Pay Request

Question Page: Direct Pay Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
What is this Direct Payment for?	Academic Recruitment Commission/Fee Attorney Fee Freight / Postage / Shipping Legal Settlement Local & Federal Government Payment Medical Service Payment Memberships Official/Referee Payment Permit / License (non-IT) Royalty Payment Subscription/Publication (non-IT) Utilities - Electricity Utilities - Gas Utilities - Oil Utilities - Water Utilities - Sewage Utilities - Hazardous Waste Utilities - Telecommunication Direct Pay Other	Dropdown List (Pick One)	
Service Start Date		Date	What is this Direct Payment for?
Service End Date		Date	What is this Direct Payment for?
Supplier Invoice Date		Date	
Supplier Invoice No.		Text (Single Line)	
Attachments are required for this request.		Confirm (Single Checkbox)	

Question Page: Cost Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Academic Recruitment Commission/Fee Details		Cost/Pricing Details	What is this Direct Payment for?
Attorney Fees Details		Cost/Pricing Details	What is this Direct Payment for?
Freight / Postage / Shipping Details		Cost/Pricing Details	What is this Direct Payment for?
Legal Settlement Details		Cost/Pricing Details	What is this Direct Payment for?
Local & Federal Government Payment Details		Cost/Pricing Details	What is this Direct Payment for?
Medical Service Details		Cost/Pricing Details	What is this Direct Payment for?
Membership Details		Cost/Pricing Details	What is this Direct Payment for?
Official/Referee Payment Details		Cost/Pricing Details	What is this Direct Payment for?
Permit / License (non-IT) Details		Cost/Pricing Details	What is this Direct Payment for?
Royalty Payment Details		Cost/Pricing Details	What is this Direct Payment for?
Subscription or Publication (non-IT) Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Electricity Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Gas Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Oil Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Water Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Sewage Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Hazardous Waste Details		Cost/Pricing Details	What is this Direct Payment for?
Utilities - Telecommunication Details		Cost/Pricing Details	What is this Direct Payment for?
Direct Pay Other Details		Cost/Pricing Details	What is this Direct Payment for?

Direct Pay Request (Restricted Use)

Question Page: Direct Pay Information

Question Text	Response Options	Response Type	Conditionally visible based on which question
What is this Direct Payment for?	Credit Card Bank Payment Direct Pay Other	Dropdown List (Pick One)	
Supplier Invoice Date		Date	
Supplier Invoice Number		Text (Single Line)	
Attachments are required for this request.		Confirm (Single Checkbox)	

Question Page: Cost Details

Question Text	Response Options	Response Type	Conditionally visible based on which question
Credit Card Bank Payment Details		Cost/Pricing Details	What is this Direct Payment for?
Direct Pay Other Details		Cost/Pricing Details	What is this Direct Payment for?

Request to Close PO

Question Text	Response Options	Response Type	Conditionally visible based on which question
Purchase Order Number		Text (Single Line)	
Supplier Name		Text (Single Line)	
Justification for Request		Text (Multi-Line)	

Supplier Extension or Re-Invite

Question Text	Response Options	Response Type	Conditionally visible based on which question
Request Type	Grouping		
What are you requesting?		Multiple Choice (Pick One)	
Resend Invitation: Supplier Information	Grouping		
Suppliers Legal Company Name		Text (Single Line)	
CSUBUY Supplier Number		Text (Single Line)	
Invitation Email (Please see help text for guidance)		Text (Single Line)	
Extension Request: Supplier Information	Grouping		
Which Campus Uses this Supplier	Bakersfield Chico Fresno San Luis Obispo Chancellor's Office Humboldt San Marcos Sonoma	Multiple Choice (Pick One)	
Do you need to use the supplier for a PO or Invoice Payment within 1-2 business days?		Yes/No	
Suppliers Legal Company Name		Text (Single Line)	
CSUBUY Supplier Number		Text (Single Line)	
Select the type of products and/or services the supplier will provide.	Vendor will provide a service, labor, or installation on campus/in California. Vendor will provide a service remotely. Vendor will provide goods. Vendor will create custom goods (branded/promotional, commissioned art, floral arrangements, etc.)	Multiple Select (Pick Many)	
Provide additional details of the products and/or services the supplier will provide you.		Text (Multi-Line)	
Please provide additional information for the extension such as providing additional fulfillment or remit address.		Text (Multi-Line)	
Will the extension require additional fulfillment or remit addresses?		Yes/No	

Please provide documentation that supports this request.		Text (Multi-Line)	Will the extension require additional fulfillment or remit addresses?
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Supplier Maintenance Request

Question Text	Response Options	Response Type	Conditionally visible based on which question
General Maintenance Question	Grouping		
Which campus is the change for?	Bakersfield Chancellor's Office Chico Fresno Humboldt San Luis Obispo San Marcos Sonoma	Multiple Choice (Pick One)	
Is the change for all of the business units on your campus?		Yes/No	
List the specific business unit(s) the change should be made to.		Text (Multi-Line)	Is the change for all of the business units on your campus?
Supplier Name		Text (Single Line)	
Supplier Number		Text (Single Line)	
What type of change is needed?	Address DBA Order Distribution Method Payment Method Supplier Class Withholding Other	Multiple Select (Pick Many)	
Address Details	Grouping		
What type of address are you changing?	Fulfillment Remit Physical	Multiple Select (Pick Many)	
Please provide details on what changes are needed for Fulfillment addresses.		Text (Multi-Line)	What type of address are you changing?
Please provide details on what changes are needed for Remit addresses.		Text (Multi-Line)	What type of address are you changing?
Please provide details on what changes are needed for Physical (Headquarters) addresses.		Text (Multi-Line)	What type of address are you changing?
Provide documentation that supports this request.		File Upload	
DBA Details	Grouping		

Provide details on what changes are needed for the supplier's DBA.		Text (Multi-Line)	
Additional details may be required to make the changes to the DBA. Provide the contact information of the individual requesting this change.		Text (Multi-Line)	
Order Distribution Method Details	Grouping		
Provide the reasoning for the change to how the supplier receives their PO (order distribution method)		Text (Multi-Line)	
Failed payment Method	Grouping		
Provide details on what occurred with the failed payment method to require changes.		Text (Multi-Line)	What type of change is needed?
Supplier Class Details	Grouping		
Provide details on what changes are needed for the supplier classes.		Text (Multi-Line)	
Withholding Details	Grouping		
Type of withholding adjustment	Add Withholding Remove Withholding Update Withholding	Multiple Choice (Pick One)	
You selected remove withholding, is this change permanent?		Yes/No	Type of withholding adjustment
Provide additional explanation for your selection of add/update withholding selection.		Text (Multi-Line)	Type of withholding adjustment
Other Details	Grouping		
Provide details on what changes are needed.		Text (Multi-Line)	What type of change is needed?

Request to Close PO

Question Text	Response Options	Response Type	Conditionally visible based on which question
Purchase Order Number		Text (Single Line)	
Supplier Name		Text (Single Line)	
Justification for Request		Text (Multi-Line)	