

What Forms Should I Use For Each Transaction?



Learn what forms to use for various transactions within CSUBUY.

CSU FORM REQUESTS

The form requests for CSUBUY are used to create complex requests for the purchase of goods and services. These forms are located on the **Shopping Home Page** under **Showcases**. Open a request form and complete the required information before submitting your request. Review the different forms that are available to determine which to use.

Goods and Services Request

Use to request goods and/or services that are not available via any catalogs.

Examples include:

- Classroom or Laboratory Supplies
- Drone
- Equipment
- Furniture
- Legal Services
- Marketing or Branded Items
- Transportation Charters
- Vehicles
- Goods - Other
- Services - Other

IT Hardware Request

Use to initiate a request for IT Hardware and Accessories.

IT Software Request

Use to initiate a request for IT Software, Website or Software Maintenance, or Cloud Services.

Independent Contractor Request

Use to initiate a request for services provided by an individual who is self-employed, a guest speaker, or a guest lecturer. Examples would be:

- Guest Speaker or Lecturer
- Individual Providing Service to the Campus and/or Auxiliary.

Hospitality Form (Non-Travel)

Use to initiate a request for non-travel Hospitality, such as:

- Award or Service Recognition
- Catering
- Entertainment Services
- Farewell Award or Event

QUICK REFERENCE GUIDE

- Morale Function
- Participation Incentive
- Promotional Items
- Venue

Direct Pay Request

Use to initiate a Direct Payment of a voucher.

Examples include:

- 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)
- Credit Card Bank Payment
- Royalty Payment
- Subscription/Publication (non-IT)
- Utilities – Electricity, Gas, Oil, Water, Sewage, Hazardous Waste, Telecommunication, Direct Pay, or Other.

Payment for Unauthorized purchase

Use to process a payment for a good or service that was not authorized through the appropriate purchasing channels. A reason or justification is required.

Request to Close/Reopen PO

Use to request to reopen or close an existing PO. Note that this request will be routed to the campus Purchasing department for review and processing.

Facilities and Construction Request

Use to initiate a Facilities or Public Works Project. Note that this form request is for Facilities use only.

Examples include:

- Construction
- General Services / Installation and Supply
- Maintenance of State Facility or Property
- Professional Services (related to Public Works)
- Other

Supplier Extension Request

Use to request a supplier that exists within CSUBUY but for another campus.

Emergency Supplier Request

Use to request a supplier if (1) the supplier doesn't exist in CSUBUY, and (2) this is a valid emergency. This form will route to Purchasing or AP for approval before routing to supplier management.