

## How to Submit the Hospitality Justification Form

### Routing

1. Enter your own email address as the Contact.
2. Add up to 3 department reviewers if needed. These fields are optional and should only be used if your approver or department wants a staff member to review the form before the approver signs it.
3. Enter the DOA approver. This person must meet the following criteria:
  - a. Valid DOA signer for the chartfield(s) that will be listed on the form
  - b. Not the Contact or an employee that reports to the Contact
  - c. Will not directly benefit from the hospitality being requested (special exceptions may apply)
4. Up to 2 additional signers may be entered if needed in the Approver 2 and Approver 3 fields. These fields are optional.
  - a. If multiple chartfields will be used that each require a separate signer, enter the additional DOA signers here.
  - b. If the form includes BKFDN funding, Heath Niemeyer must be included as either Approver 2 or Approver 3.
5. If the request is related to human subject research, include Gwen Parnell ([gparnell@csub.edu](mailto:gparnell@csub.edu)) in the Compliance Review field. **This field is only required for requests relating to human subject research.**
6. For requests that include grant funding, include your assigned grant analyst and the AVP of GRaSP if needed. **These fields are only required for grant funding.**
  - a. Requests over \$3000 must include the AVP of GRaSP in addition to the grant analyst. Requests under \$3000 only need to include the analyst.
7. The form does **not** need to route to Payment Services; don't add them in the routing.

### Section 1

1. Choose a business purpose:
  - a. The Awards & Prizes and Participation Incentive business purposes are for gift card purchases. The other four are types of events (Memorial/Retirement/Farewell, Service Award, Business Meal, and Morale Function).
  - b. Business Meal is the default for events that include food. The other three event types should only be used if the event fits that specific description.

- c. Only fill out the fields for employee’s name and years of service if you selected the corresponding business purpose (Memorial/Retirement/Farewell for the first field, and Service Award for the second field). Otherwise, leave these fields blank.

### HOSPITALITY JUSTIFICATION FORM

*Replaces the Business Meal Approval Form (BMAF) & Gift Preauthorization Form*

**EVENT/EXPENSE DESCRIPTION**

**What is the business purpose of the hospitality? Check the one that describes the event best & enter business purpose details:**

Memorial/Retirement/Farewell & \*Employee Name     
  Service Award & \*Employee Name & Years of Service  
 Business Meals     
  Awards & Prizes (incl. gifts)     
  Morale Function     
  Participation Incentive  
*(professional development, meetings)*

**Business purpose (Why & Who). Required: What is the CSUB affiliation of the attendees? (Faculty, staff, students, or guests?)**  
 Farewell function for Jim Smith, Director of Whatever. He is retiring after 19 years at CSUB. Attendees will be his family, staff, ex-staff.

- In the “Explain more about the event” field, enter any relevant details about the event and expense(s). The information entered in this section will be different depending on the type of request:
  - A brief description of the event and expense(s) should always be included.
  - The attendees’ or recipients’ relationship to CSUB should always be included (students, employees, off-campus guests). We need to know this because:
    - The account number to use will be 660828 – hospitality – only if students, candidates, or other guests are included.
    - If only staff, faculty, and/or student assistants are included, the account number is 660090 – other costs.
  - If gift cards will be purchased, include the number of gift cards and dollar amount per gift card, and specify how the recipients will be determined (e.g. chosen at random from event participants).
  - If one or more business meals are being purchased, specify which meals are being provided.
  - If the form will include multiple expense types (e.g. food and venue rental, or food and gift cards), include an estimate of how much will be spent on each expense type.
  - If the form includes food expenses, specify whether or not the food will be catered. All food that is delivered to the event location by a restaurant or other company is considered catering.

**1. What is the business purpose of the hospitality? Check the one that describes the event best:**

Memorial/Retirement/Farewell (enter person’s name)     
  Service Award (enter employee’s name & # of years of service)  
 Business Meals     
  Awards & Prizes (incl. gifts)     
  Morale Function     
  Participation Incentive  
*(includes prof. development, meetings)*

**\* Explain more about the event/hospitality, including WHO will be invited (are they students, guests, candidates, staff, or faculty?)**  
Example form - event details and description of expense will be entered here.

## Section 2

1. Enter the event name.
2. Enter the event date.
  - a. The event date **must be a future date.**
  - b. Allow enough lead time for all signers to complete the form prior to the event date. The form must be fully approved before purchases are made.
  - c. Make sure to include the year when entering the date (“4/15/2024,” as opposed to “April 15<sup>th</sup>”).
  - d. For gift card purchases and blanket meal approvals for a specific program or event series, the date may be a range within the current fiscal year (e.g. “April – June 2024”).
  - e. The date range may not extend beyond the last day of the current fiscal year.
3. Enter the vendor name(s). If you don’t know yet, enter that information.
4. Select whichever expense types are applicable to your request
  - a. Business Meals/Catering must be selected if the request includes food.
  - b. Participation Incentive and Awards & Prizes are for gift card purchases.
5. Attach backup documentation
  - a. A quote must be attached if the form includes catering expenses.
  - b. An event flyer or guest list must be attached for all food expenses.
  - c. For gift card expenses, attach either a list of expected recipients or a flyer for the event/research study.

## Section 3

**Only fill out this section if the form includes food expenses. For requests that do not include food, skip to Section 4.** The yes/no box for alcohol will need to be checked even if Section 3 is skipped, but the rest of the information can be left blank.

1. If you know the number of attendees and the estimated per-person cost, enter these numbers into the form, and the form will calculate a total.

**3a. Req'd for Business Meals/Catering:** *Aramark should be paid with a ProCard; attach this approved form to the paperwork.*

Number of attendees:	5	Cost Per Person:	\$20	Total Meal/Catering Cost:	\$100.00
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2. If you know the number of attendees and the estimated total cost, divide the total cost by the number of attendees to obtain the per-person cost. Then enter the number of attendees and per-person cost into the form. The total calculated by the form should be close to the number you started with (it may be a few cents off due to rounding).
3. Select yes or no for alcohol. Note that this selection is required even if you’re skipping Section 3.

#### **Section 4**

1. Enter the chartfields and chartfield total.
2. The chartfield total must be greater than or equal to the total listed in Section 3:
  - a. If the request is only for food, then the two totals will be the same.
  - b. If the request includes both food and other expenses, the chartfield total will be the grand total for all expenses. A breakdown of expenses should be included in the “Explain more about the event” field in Section 1. For example, a request for catering and venue rental might say, “\$500 for catering, \$100 for venue rental” in Section 1. The Section 3 total would then be \$500, and the chartfield total would be \$600.

#### **Section 5**

Section 5 does not need to be filled out by the requester. Signers will provide their signatures in the order they were listed when the form was routed.

**This form does not need to be approved by Payment Services.** It is the department’s responsibility to get any hospitality expenses pre-approved and then attach the completed form to all payment paperwork.

All signers will receive a completed copy from Adobe Sign when the form is fully approved.