

## INSTRUCTIONAL PROCEDURES

CSFPF has authority to enter into contracts, as well as procure goods and or services on behalf of the University using the procedures established below:

### Submitting a CSFPF Requisition Request:

1. Click on the CSFPF ServiceNow Requisition Request located on the CSFPF website:  
<http://foundation.fullerton.edu/forms/>
2. Complete the Requisition Request by ensuring the following information is provided:
  - Vendor information (name, email and mailing address)
  - Request type: New or Change
    - If change select, a valid purchase order number must be entered (all start with “P”)
  - Deposit: check box and enter the amount
  - Goods and Services: click the add button to enter the following information:
    - Description and justification
    - CSFPF account number
    - Total amount to be paid (include sale tax, delivery, and other applicable fees)
    - Once the required data has been entered, click the add button to save
    - If additional lines are needed, click the add button and repeat the steps listed above
  - Compliance review questions must be answered before proceeding
    - Depending on the answer selected, the system may require uploading documents (hospitality (D11) form, insurance or IT authorization)
3. Upload supporting documentation, which may include but is not limited to valid quote, unsigned contract/agreement and any other documentation
4. Authorized approver
  - Select the appropriate approver from the dropdown menu
    - Selecting the primary account signer is best practice
      - If you have a question who is the primary account signer for a specific account, use the following link to access the [Acct Info](#)
  - The system will automatically add a second approver box if the requested amount exceeds \$3,000
  - Temporary approver override option available until December 15, 2023
    - After November 24, approved PDF forms will be accepted; however, they must be uploaded into the new ServiceNow requisition request and require the completion of steps 1 through 3
    - Selecting the override box will skip the requirement to enter an authorized approver

T: 657-278-2786 F: 657-278-7666 <http://foundation.fullerton.edu>

5. Read and check the attestation box prior to clicking on the submit button
6. Once the requisition request has been submitted, the requester will receive a confirmation email referencing a unique RITM number. A separate email will be sent to the authorized approver requesting their approval. In the event the override box was checked, the notification will be sent directly to the Foundation team.
7. Additional requirements may apply should your request fall under the following:
  - Purchases of goods or services with matters of legal interpretation, liability risk, hazardous materials, international contracts, multi-year contracts, and or purchase of \$5,000 or more
  - Purchases of goods or services with a total value of \$25,000 to \$50,000 will require three or more information quotes in writing.
  - Purchases of goods or services greater than \$50,000 will require a Request for Proposal (RFP) through CSUF's Contracts & Procurement Department. Contact CSFPF for further instructions.
  - **NOTE:** Goods and or services that fall under the conditions listed above must have the contract made out to ***Cal State Fullerton Philanthropic Foundation AND California State University, Fullerton.***

CSFPF generally requires a minimum lead-time of 15 business days to process a complete Requisition Request. However, contracts for large amounts or requiring additional approvals from other campus units (i.e., IT, C&P, etc.) may require up to 25 business days for review and approval.

Additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website: <http://foundation.fullertn.edu/policies-forms/>

If you have any questions, please contact the Foundation at [CSFPFAP@fullerton.edu](mailto:CSFPFAP@fullerton.edu) or 657-278-2786