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## *BUSINESS MATTERS @ SAC STATE*

### **TOPIC: CSUBUY & Fiscal Year End**

DATE: Tuesday, May 12, 2026

FROM: Procurement & Contract Services and Accounts Payable & Travel

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As we approach the end of the fiscal year, we want to share important updates related to CSUBUY Procure-to-Pay (P2P), including changes to fiscal year-end processing and how to request support moving forward.

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#### **Fiscal Year-End (FYE) Process Update**

The CSUBUY P2P Global Fiscal Year-End process will go into effect Monday, May 4th. During this period, there are changes to how requisitions are reviewed and processed.

Systemwide training recently provided by the Chancellor's Office offered insight into upcoming process changes, and it was strongly recommended that key impacts and timelines be communicated to the campuses as soon as possible.

What to expect:

- All requisitions, including punchout orders, submitted during the fiscal year-end period will undergo additional review to determine whether they should be applied to the current or next fiscal year
- This may result in longer processing times
- Users may be contacted for clarification if additional information is needed
  - This may delay processing if enough information is not provided prior to submittal

For additional detail, please refer to the Fiscal Year-End training materials and End User Guide available in the [CSUBUY training library](#).

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#### **How You Can Help During FYE**

To help ensure a smoother review process:

- Clearly indicate the intended fiscal year

- Use the Comments field and/or Cart Name to identify whether the request is for the current or next fiscal year
- If no information is provided, Procurement will apply requests submitted to the current FY (2025–2026)
- Plan ahead for next fiscal year requests

The FYE process allows for earlier submission of next FY requisitions (including blanket POs), which is an improvement over the previous system blackout period in June/early July.

- Use caution with early punchout orders (orders for 26/27 entered in 25/26)
  - Punchout catalog orders (e.g., Amazon, Staples) should not be submitted early for next fiscal year needs
  - Pricing and availability are not guaranteed over extended periods
  - These orders should be submitted as needed (ideally within the week of purchase)

Providing clear information up front will help Procurement review and process requests more consistently.

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## **New Support Process – Optimize Ticketing**

As part of a systemwide transition from ServiceNow to Optimize, the Chancellor’s Office has implemented an updated ticketing process where all support requests will route to campus teams first (Tier 1 support) before being escalated as needed.

To align with this change and improve consistency in how requests are tracked and addressed, we are updating how campus users should request support.

Effective May 1, campus users should submit support requests using the Optimize ticketing system:

- CSUBUY P2P support: Submit via the "Open a Ticket using Optimize" link available on the P2P homepage
- ProCard/Concur support: Submit via the "Optimize Ticket" link available within the Concur portal

Before submitting a ticket, please:

- Check the campus [P2P FAQ page](#), as many common questions are already addressed
- Review available training resources and guides on the [campus P2P page](#) and in the [CSUBUY training library](#) (requires log in)

Submitting a ticket allows us to ensure requests are:

- Logged and tracked
- Routed to the appropriate support team
- Addressed more consistently and transparently

The campus will be transitioning away from using email inboxes for general P2P support questions, as receiving requests through multiple channels (shared inboxes, direct emails, etc.) has made it difficult to consistently track and respond to inquiries.

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We recognize that this update comes at a time when several system processes are already undergoing transition, including CSUBUY P2P, DOA360, and recent ProCard and Concur updates. Although much of the guidance is not new at the systemwide level, many of the related changes are being introduced to campuses in close succession and, in some cases, with limited lead time.

We understand this may feel like an additional layer of change and sincerely appreciate your flexibility and understanding as we work through these updates together.

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Additional guidance will continue to be shared as we move through fiscal year-end and ongoing system stabilization.

Questions regarding CSUBUY should be directed to our [P2P Team](#). Questions regarding Concur should be directed to [procard@csus.edu](mailto:procard@csus.edu) for Procard related inquiries, and [aba-fin-ap-travel@csus.edu](mailto:aba-fin-ap-travel@csus.edu) for Travel Cards.