

October 2025 Business Partners Round Table (BPRT) Meeting Summary



Opening– Elena Larson, University Bursar

<https://www.csus.edu/administration-business-affairs/financial-services/ internal/ documents/bprt-2025-2026/2025.10/01.opening.pdf>

@ 0:02:26

Comment Cards



Systems Access & P2P (Procure-to-Pay)

Q: Can IRT present on the proper way to submit CARS and OnBase access requests?

A: The P2P system (Procure-to-Pay) will change how system access requests are handled.

Details are still being finalized; IRT may provide future training or presentations. This question was forwarded to IRT as the OnBase CARS request process currently belongs with them.



Requisition & Payment Cancellations

Q: Can procurement and accounts payable notify staff when requests are canceled?

A: For Direct Payment Requests (DPRs): Adobe sends an automated email with cancellation reasons and approver details. For Requisitions: The individual canceling the requisition will send an email explaining the reason (e.g., missing ICT). Exceptions: Bulk cancellations at fiscal year-end won't include individual notices due to volume. Example: Blanket POs remain open through July to allow for June payments, but new ones must be created each fiscal year.



Shared Access to Spec Sheets

Q: Can spec sheets for stateside and foundation funds be shared in a Teams folder?

A: Possible, but must address compliance, privacy, and logistics. Will be reconsidered once a new Assistant Vice President of Financial Services is hired.



Upcoming Meetings

Spring 2025 meetings scheduled for Feb 17 and Apr 14, 9–11 AM.



Year-End Deadlines

Draft schedule for departmental year-end deadlines [published](#). Awaiting confirmation from Chancellor's Office and assessment of P2P impacts. Changes will be communicated via *Business Matters @ Sac State* (BMSS) to the [BPRT Listserv](#) and Monday Briefing



Accounts Payable & Travel – Sarah David & Kayla Guerrero, Accounts Payable & Travel

<https://www.csus.edu/administration-business-affairs/financial-services/ internal/ documents/bprt-2025-2026/2025.10/02.travel.pdf>

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Policy Updates (CSU Systemwide, In Development)

- New standardized CSU policies:

- Hospitality & Travel Policies: Adding clearer roles and responsibilities; meal rate maximums likely slight increase.
- Delegation of Authority (DOA360): Standardized approval and spending limits across campuses.

Payment Card Policy:

- Travel card: \$5,000 monthly limit
- P-card: \$10,000 monthly / \$5,000 per transaction limit
- Unified rules for all cardholders.

Concur Optimization Project – *Sarah David, Accounts Payable & Travel*

- Employee reimbursements & ProCard reconciliations will move from Adobe Sign into Concur.
- CSU-wide standardization of reimbursement and travel workflows.
- Implementation in FY25–26 Q3

AP Reminders

- One invoice per payment request.
- Do not use “RM” suppliers (*reserved for Student Financials*).
- Vendor Data Record Form available for new or missing suppliers.
- AP 101 & Hospitality 101 training recordings available via Teams (no more live sessions).

Q: Can AP and Hospitality 101 training links be added to Financial Services’ website?

A: Yes — Jeanne will update the webpage to include them.

Q: How will P2P supplier updates affect Non-Employee Reimbursement (NER) for VP recruitments?

A: No immediate change. NER will continue in Concur using the current 204 vendor form process.

Follow-up Q: Should we meet one-on-one to adjust internal workflow?

A: Trainings will be available later as part of the Concur Optimization Project rollout.

Q: Are NER processes the same for now?

A: Yes. Continue current procedures until the new Concur system launches.

Q: Are the new credit card service requests (limit increases, new cards) for all cards or only travel cards?

A: All university cards. The Concur Optimization Project will manage all card types in one system.

Procure-to-Pay (P2P) System Update – *Kayla Guerrero, Accounts Payable & Travel, & Sebastian Head, Procurement & Contract Services*

<https://www.csus.edu/administration-business-affairs/financial-services/internal/documents/bprt-2025-2026/2025.10/03.01.csubuy-oct-update.pdf>

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- Current Progress: ~63% complete.

- Go-live: January 2026.
- Supplier onboarding emails from noreply@jagger.com. Departments should verify legitimacy if questions from vendors. Financial Services staff will reach out to vendors beforehand to let them know the supplier invites are coming

Benefits & Features:

- One integrated system for requisitions, POs, and payments.
- Built-in approval workflows such as ICT, hospitality, and independent contractor.
- Full visibility for staff and suppliers into payment and requisition status.
- Fewer cancellations: Requests can often be returned for correction instead.
 - Exceptions: if an incorrect form was used for requisition submittal it will need to be cancelled and reentered using the appropriate form (i.e., Goods and Services request form used for hospitality purchase).
- Roadshows & Training: Role-based sessions and demos planned; interest form available - https://surveys.csus.edu/jfe/form/SV_5v6hXlkCl2v2Owu
 - We kindly ask that departments complete the survey so that we can customize hot topics and division/department specific topics

Q: Will ICT requests still be separate?

A: No, integrated into workflow.

Q: Who should fill out the roadshow survey? Individuals or teams?

A: Either option; results will be consolidated as applicable.

Q: Will all business units be included?

A: Yes: University, UFSS, and CapRadio — other Auxiliaries may follow later.

Q: Will ProCard purchases like e-books still use the current process?

A: Many transactions will transition into P2P as requisitions/POs instead of ProCard payments.

Q: Will the "Payments to Students" form be included in the new P2P system?

A: Not at this time. It's not on the initial list of forms, but inclusion may happen in a future update.



New OnBase Agreement Request Form – Kathleen Paclibar, Procurement & Contract Services

<https://www.csus.edu/administration-business-affairs/financial-services/internal/documents/bprt-2025-2026/2025.10/03.02.contractintake.pcs.pdf>

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Purpose

- Streamline non-CFS agreement requests (not tied to POs).
- Replace confusing email-based process with a single digital form.

Features

- Dynamic form adjusts fields by agreement type (e.g., internship, MOU, lease).

- Auto-email updates send to requestor: received, assigned, in-process, completed.
- Requestor AND vendor can see current status
- Serves as interim solution until CSU Buy contracts module is ready.
- Includes amendment requests for both agreements and POs.

Timeline: Acceptance testing nearly done; campus-wide rollout planned soon.

Q: Does it include interagency agreements?

A: Yes.

Q: What about renewals/amendments?

A: Yes, selectable from dropdown.

Q: Are “no-cost” agreements included?

A: MOUs (Memorandums of Understanding), where the university commits resources but no funds, will also be included.

Q: If a requisition is returned or canceled, can we see the reason and history?

A: Yes. The full history and notes, including compliance approvals and routing, will be visible in the system for transparency.

Q: Will the “Payments to Students” form be included in the new P2P system?

A: Not at this time. It’s not on the initial list of forms, but inclusion may happen in a future update.

BREAK

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 **Environmental Health & Safety Update – *Bob Hitomi, Environmental Health & Safety***

<https://www.csus.edu/administration-business-affairs/financial-services/internal/documents/bprt-2025-2026/2025.10/04.envirupdatefall2025.pdf>

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Hazardous Materials & Waste:

- Staff must complete *HazCom* training if they encounter hazardous chemicals and materials in their normal job duties.
- Submit pickup requests for hazardous materials via EH&S website:
<https://www.csus.edu/campus-safety/environmental-health-safety/>



Universal Waste:

- Batteries, bulbs, aerosols → must be recycled.
- Use EH&S-provided containers and pickup forms.



Stormwater Pollution Prevention:

- Prevent dumping chemicals into drains (campus discharges to the American River).

- Report spills or illegal dumping to EH&S or Facilities.

Q: Do all batteries (even alkaline) require recycling?

A: Yes — all types must be recycled.

Q: Can any department get a battery collection receptacle?

A: Yes. Call extension 8-2020, and one will be delivered.

Q: How should departments dispose of an empty helium tank?

A: EH&S can help. Contact their office for pickup and disposal assistance.



HR / CHRS Updates – Deborah Ceryes, Human Resources

No Presentation Materials

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Issue: When managers separate, their “Reports To” field must be updated so approvals continue.

Action: Submit a “Reports To” [change form](#) when processing separations.

- Review the [Separation Checklist](#) for guidance.
- More [helpful job aids](#) for Manager separation
- Working with IRT to improve the on-base separation form to include new supervisor info.



IRT Updates – Kelli Hunt & Long Lim, IRT Customer Service

<https://www.csus.edu/administration-business-affairs/financial-services/internal/documents/bprt-2025-2026/2025.10/05.ict-changes.pdf>

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ICT (Information & Communications Technology) Form Changes

Added:

- Local ITC (Information Technology Consultants) collaborator field (mandatory; defaults to IRT if unknown).
- “Date Needed By” field (sets expectations but no guaranteed deadline).
- Note: Selecting “Not Sure” may delay review.
- Created a simplified form for *standard hardware* (e.g., standard Lenovo/Mac laptops).
- Users can reuse prior ICT request numbers to auto-fill past answers. If you know your ICT record number, you can access the information and the form will prepopulate with prior year data. Information will build and update year-over-year for convenience.

Q: Do recurring subscriptions (e.g., Canva) need annual ICT?

A: Yes, for now; may change in future versions.

Q: Can old ICTs be searched?

A: Yes, by number or requestor; enhanced search under review.

Q: Can I reuse an ICT for a replacement item?

A: Yes, if specs unchanged.