

P2P Updates

Business Partners Round Table

CSU The California State University



A COLLABORATIVE PROCURE TO PAY MARKETPLACE

SUMMARY

- P2P went live January 26
- We are now in Week 4 of post-go-live
- Remaining Lab Sessions:
 - Today
 - Thursday
- Office Hours
 - This Friday & Next Friday
- Sign up Via Financial Services Trumba
<https://events.csus.edu/sac-state-financial-services>

Direct Payments & After-the-Fact Purchases

Direct Payment Requests (DPR)

- Adobe Sign DPR form no longer available
- Any After-the-Fact purchases must now be submitted in P2P

 **Do NOT Use:**

“Unauthorized Purchase Request” form

(This form bypasses compliance workflows and will be rejected)

Required Process:

- Submit requisition using the appropriate form type
- Clearly identify “AFTER THE FACT” in Cart Name and Reference ID field
- Attached required Justification Memo that includes explanation of exception and remediation

After-the-Fact User Guide will be posted to our website soon

Operational Reminders

Payment in Advance

- Reviewed case-by-case
- Must be clearly identified in requisition
- Use comments section if needed
- Create separate line for deposit amounts

Ship To Guidance

- Ship To defaults to Central Receiving
- Include Building & Room # in “Attn:” field

Ship To

Attn: Kathleen Paclibar - Modoc Hall 3005

CSU Sacramento - Central Receiving

6000 J Street MS 6117

Sacramento, CA 95819-2605

United States

Order Consolidation

- Please consolidate small PunchOut orders when possible
- Accounts Payable is experiencing high volume of very low dollar invoices

Important Reminder

⊘ CSU Employees and Students **cannot be set up as suppliers in P2P**