BUSINESS PARTNERS ROUND TABLE

Presentation Synthesis & Quick Reference

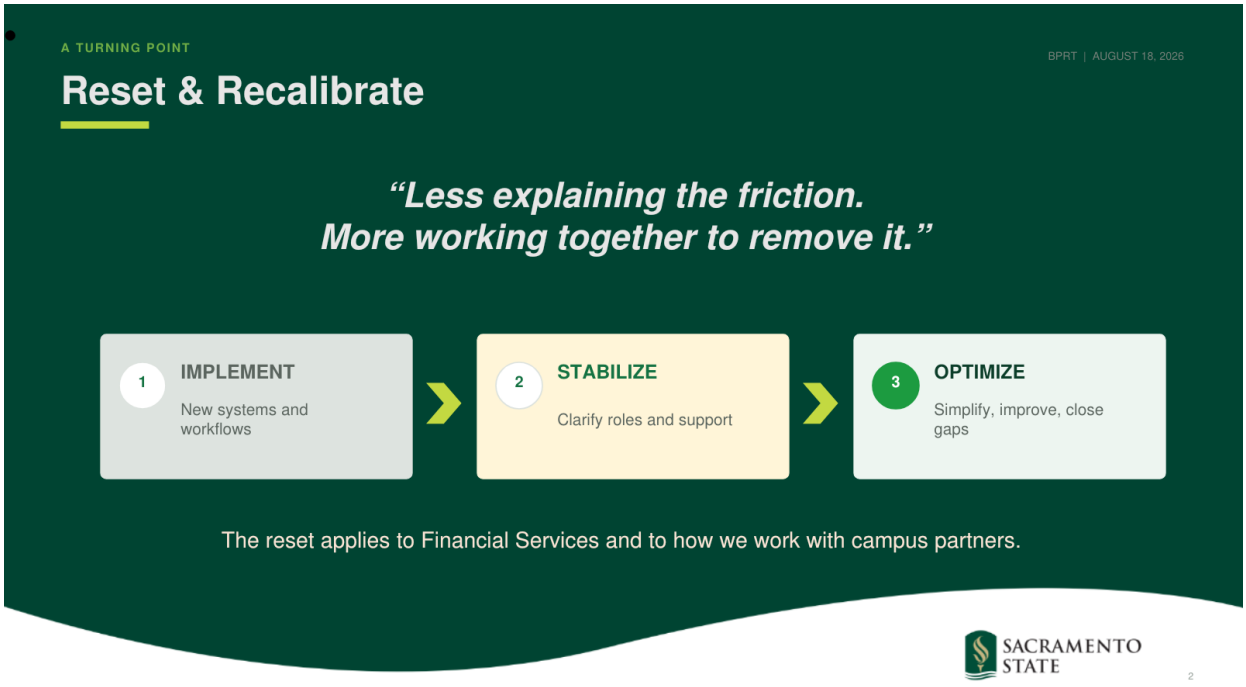
August 18, 2026 • Reset & Recalibrate

CRITICAL LINKS

- BPRT Webpage
- Presentation Materials
  - Opening Message from Financial Services AVP, Melissa Roth
  - Accounts Payable & Travel Updates
  - Procurement & Contract Services Updates
  - Bursar's Office: Deadlines
- August 2026 BPRT Recording
- August 2026 FAQs
- P2P GPT

CENTRAL MESSAGE

The major implementations are in place. The next phase is to stabilize support, clarify ownership, simplify recurring tasks, and work with campus partners to remove friction.



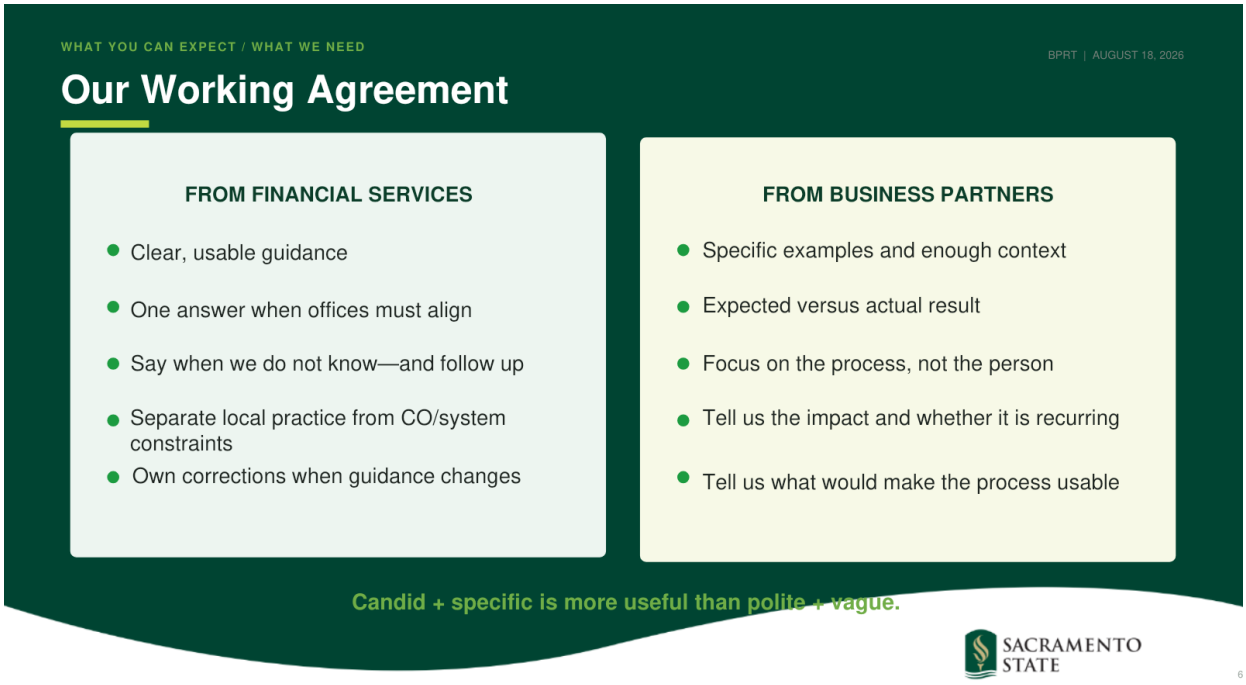
Presentation visual: the transition from implementation to stabilization and optimization.

At a Glance

Theme	What business partners should expect
BPRT reset	Clear agendas, useful updates, structured Q&A, documented follow-up, and named owners.
Feedback	Specific examples will feed FAQs, job aids, process improvement, and escalation.
Support	Use the designated channel for the issue; routine P2P how-to help is also available through the local GPT.
Procedures	Hospitality, Concur, P2P, ProCard, supplier, and contract processes have important updates.
Student deadlines	Fall deadlines affect fees, holds, financial-aid eligibility, installment plans, and registration.

1. Resetting BPRT and the Working Relationship

BPRT is shifting from an implementation forum toward a more structured problem-solving meeting. Updates should explain what changed, who is affected, and what action users need to take. General questions will be answered live when possible; case-specific or unresolved policy questions will be captured for follow-up.



Presentation visual: mutual commitments between Financial Services and campus business partners.

CONTEXT

This working agreement is intended as mutual accountability—not a set of rules for the audience. Financial Services emphasized the intent for a more coordinated answer when offices must align and an intention to confirm facts instead of improvising.

What Financial Services commits to

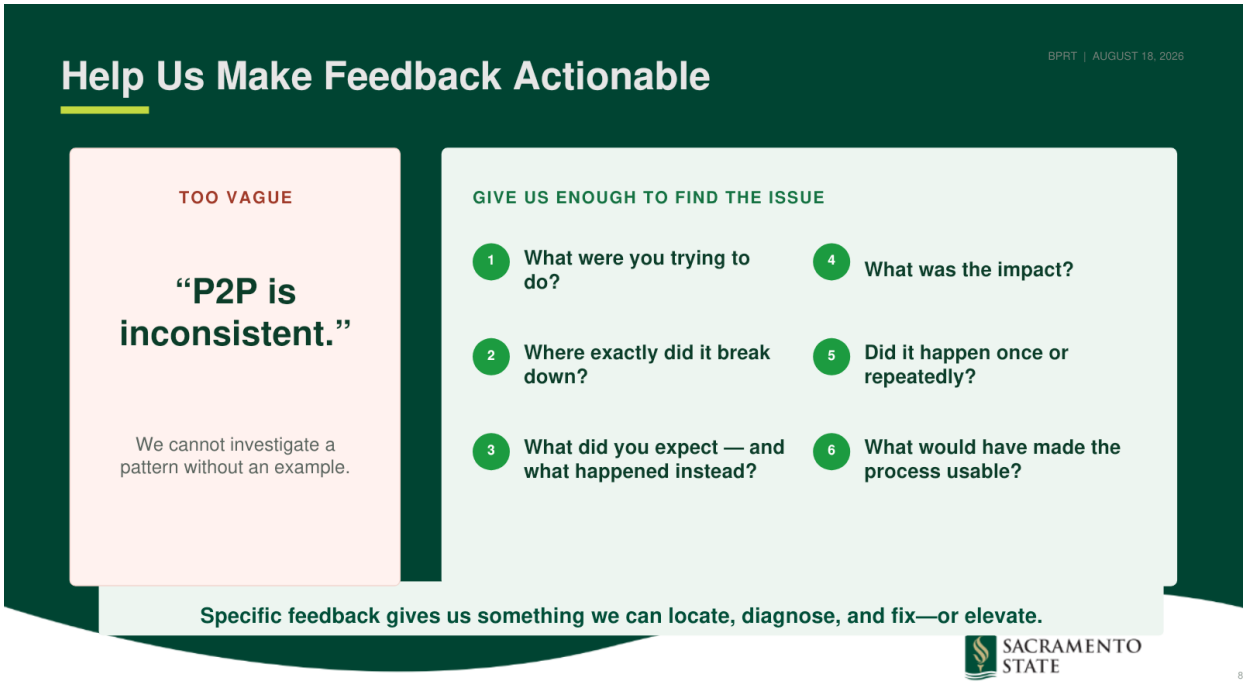
- Provide clear, usable guidance and coordinate answers across offices.
- Distinguish local practice from CO or system constraints.
- Acknowledge uncertainty, research unresolved questions, and follow up.
- Correct guidance when processes change.
- Build resilience through documentation, cross-training, and clearer support channels.

What makes feedback useful

- A specific example with enough context to locate the problem.
- The expected result and what actually occurred.
- The impact on the department, vendor, traveler, employee, or student.
- Whether the problem happened once or repeatedly.
- A description of what would make the process usable.

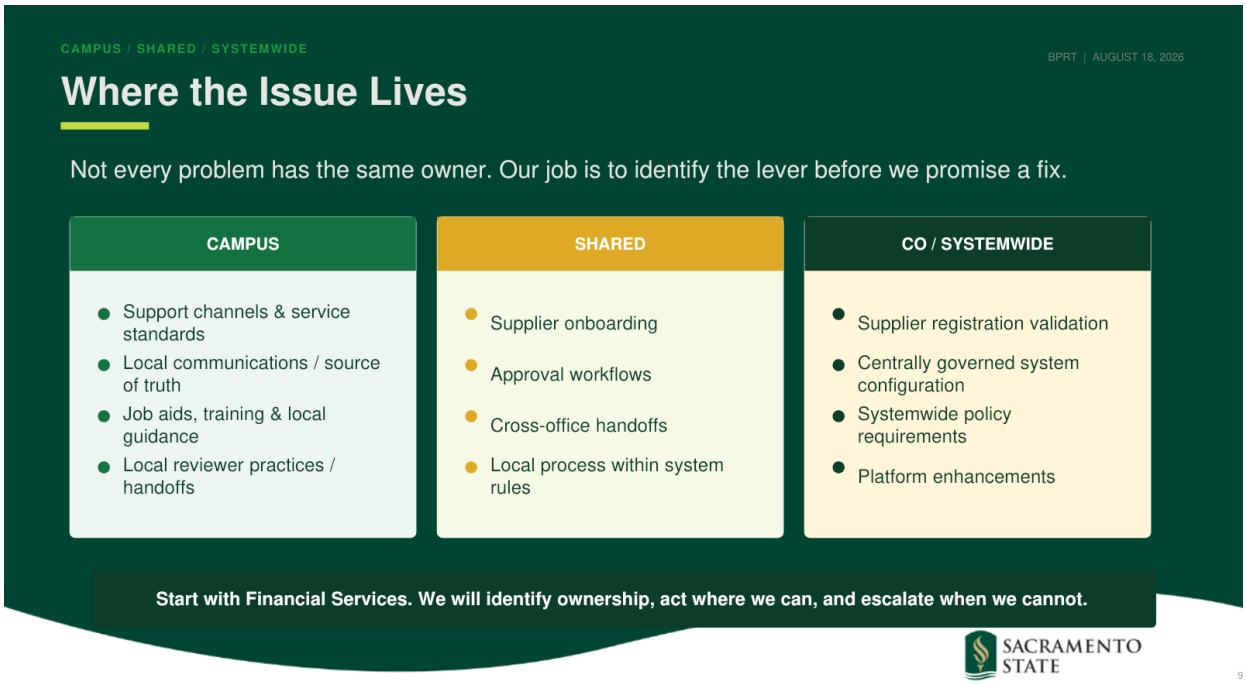
2. From Feedback to Action

Comment Cards showed recurring concerns about access to help, consistency and transparency, training and documentation, and confusion about who owns what part of a process - system vs. campus ownership. Individual responses will be consolidated into FAQs on the BPRT webpage, while recurring patterns will shape support materials and process improvements.



Presentation visual: the information needed to investigate and act on feedback.

Identify the owner before promising a fix



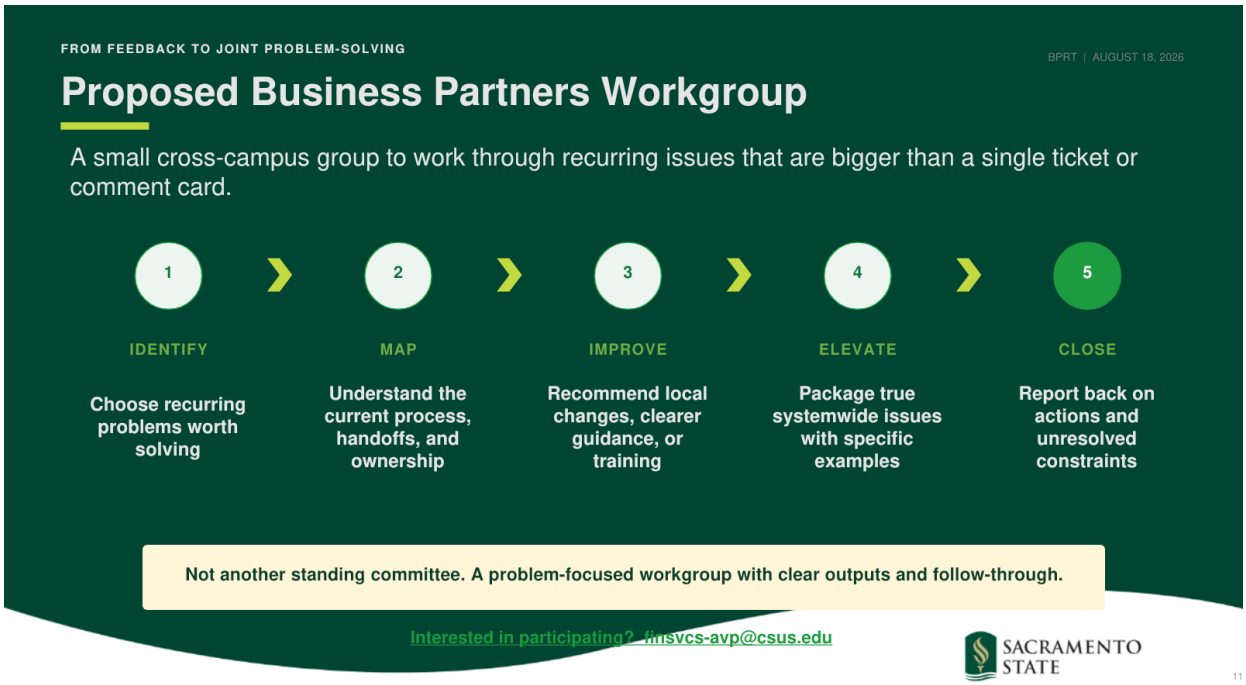
Presentation visual: examples of campus-controlled, shared, and systemwide responsibilities.

IMPORTANT NUANCE

Supplier onboarding illustrates shared responsibility: campus activity may initiate or route a request, while CSU Supplier Management Team (CO) performs registration review and validation.

Proposed Business Partners Workgroup

A small, cross-campus workgroup was proposed via a Comment Card. for recurring issues that are too broad for an individual ticket. The group would be problem-focused, time-bounded where practical, and expected to produce specific recommendations and follow-through.



Presentation visual: the proposed cycle from identifying a recurring issue through reporting results.

PARTICIPATION

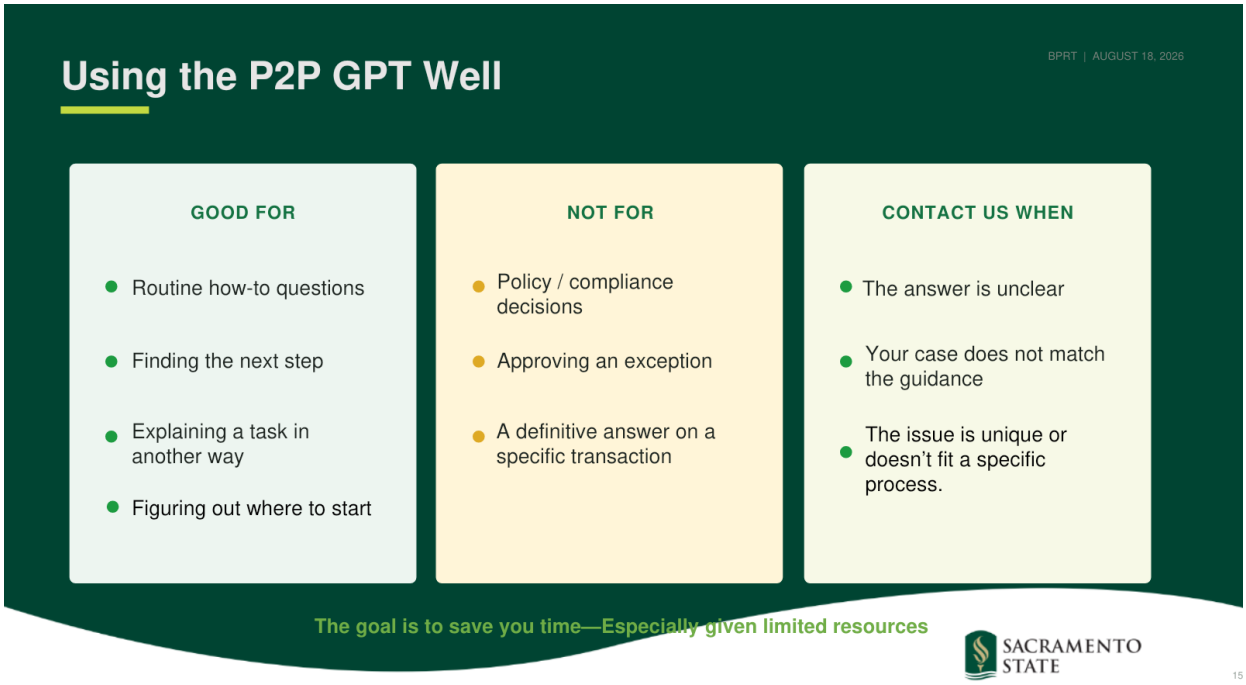
Business partners were invited to express interest through finsvcs-avp@csus.edu. Though it is preferred that this group be comprised of those who regularly work in the affected processes and can bring concrete examples, anyone is welcome to express interest. A workgroup make up that reflects all levels of knowledge would likely address issues from a more comprehensive direction.

3. P2P Help and Job Aids

Financial Services is building shorter, task-specific support around the places users actually get stuck. Planned resources include brief videos and step-by-step PDFs, with topics prioritized by recurring questions, rework, capacity, and BPRT feedback.

Business Partners who have processes that are working for them can reach out via finsvcs-avp@csus.edu.

We have also built a P2P ChatGPT. You will need to log into ChatGPT from your MySacState page. Once logged in, copy/paste: https://chatgpt.com/g/g-69efac89c2c48191b3cf51076435f19e-p2p-guidance into the same browser window. It will open the P2P GPT. Once you are in the GPT, you can 'Pin' the GPT to your saved GPTs and access it at any time.



Presentation visual: appropriate and inappropriate uses of the local P2P GPT.

Use the P2P GPT for	Contact Financial Services for
Routine "how do I?" questions	Policy or compliance decisions
Finding a next step	Exceptions or approvals
Explaining a task another way	A definitive answer about a specific transaction
Figuring out where to begin	Unclear answers or cases that do not match the guidance

CURRENT STATUS

The Chancellor's Office has expressed interest in a centralized P2P GPT, but no timeline or features were promised. The local P2P GPT remains available through the MySacState ChatGPT login.

4. Accounts Payable and Hospitality

Hospitality updates

New hospitality procedures and a PDF Punchout Hospitality Justification Form are forthcoming. Expected changes include updated roles and responsibilities, revised meal-rate limits, a clarified Appendix B, and a new Appendix C.

Receiving and voucher approval

- The PO owner should approve a voucher only after the goods or services are received.
- If a supplier submits an invoice early, wait to approve unless the Sac State Procurement Buyer has authorized payment in advance.
- A temporary Adobe P2P Submittal form and future Chancellor's Office OCR technology are expected to improve invoice submission.
- Additional fall 2026 improvements include a Punchout request with the hospitality justification form.

Attaching the Hospitality Justification Form

Report type	Required method	Critical caution
ProCard statement	Print the form to PDF and upload it as a report-level attachment.	Use Manage Receipts → Manage Attachments → Upload Report-Level Attachment.
Non-ProCard report	Link the request to the report header through Report Details → Manage Requests.	Select Do Not Update; updating may change the report-header funding source.

5. Concur Quick Reference

Foundation-funded expenses

Change	Required action
Business Unit	Use SAFDN.
Fund	Enter the appropriate UFSS Foundation X Fund.
Class Code	Remove it.
Legacy value	MDR01 is no longer valid for Foundation funding.
Before submission	Update all Foundation-funded reports to the new structure.

Travel attachments

- An agenda or itinerary is still required for all travel approval or reimbursement.

- An airfare comparison is now required when personal days are included or when driving instead of flying.
- Add the document as a manually created attachment expense. It must be a PDF smaller than 15 MB.

Itemization versus allocation

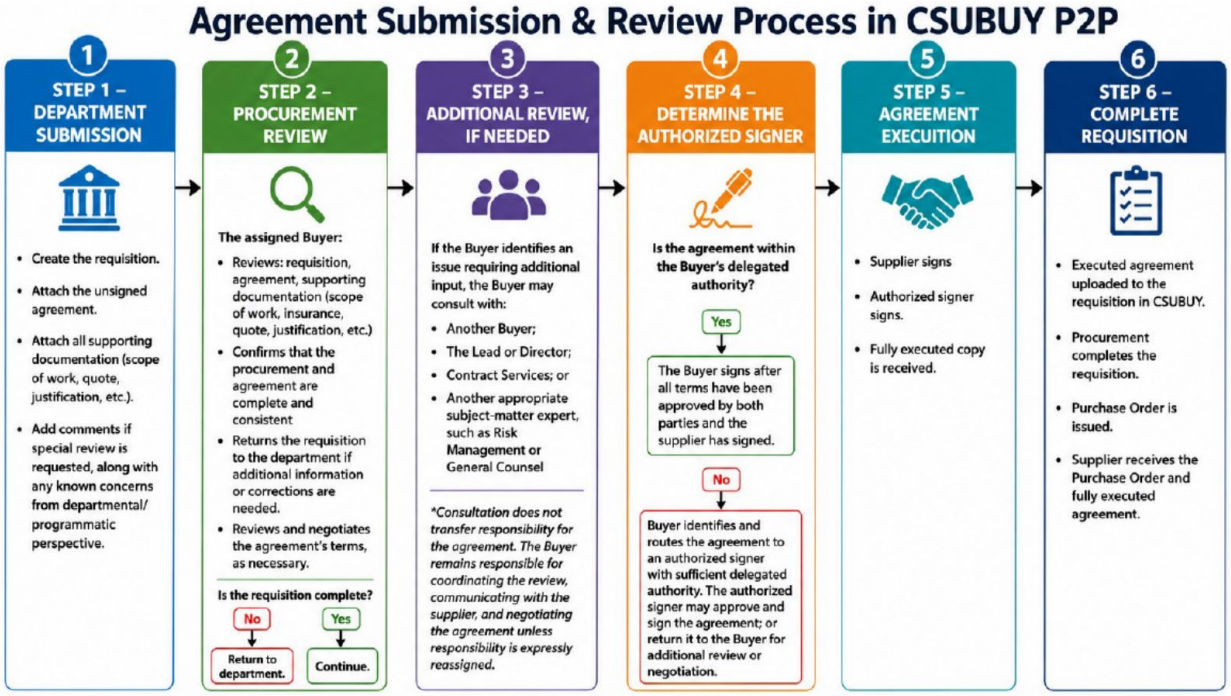
Function	Use it when	Completion check
Itemization	One transaction must be divided among multiple expense types or account codes.	Remaining amount must equal $0.00.
Allocation	An expense must be divided among departments, chartfields, or funding sources.	Allocation must equal 100% or the full expense amount.

Credit Card Request

Use the Concur Credit Card Request to order a new card, increase a limit, unblock an MCC code, request a purchase exception, or cancel or suspend a card. Required CSU Learn Payment Card Program training applies.

6. Procurement and Contract Services

Agreements submitted with requisitions



Presentation visual: the six-step agreement submission and review process in CSUBUY P2P.

1. Department creates the requisition and attaches the unsigned agreement and supporting documents.
2. The assigned buyer reviews the submission, returns incomplete items, and negotiates terms as needed.
3. The buyer coordinates additional review by Contract Services, Risk Management, General Counsel, or another subject-matter expert when needed.
4. The buyer determines whether the agreement falls within the buyer's delegated authority or must be routed to another authorized signer.
5. The supplier and authorized University signer execute the agreement, and a fully executed copy is received.
6. The executed agreement is uploaded, Procurement completes the requisition, and the purchase order is issued.

RESPONSIBILITY

Consulting another office does not transfer responsibility away from the assigned buyer unless the responsibility is expressly reassigned.

Supplier management

The Chancellor's Office manages supplier registration and validation functions, including adding suppliers, associating existing suppliers with Sacramento State, correcting supplier information, and addressing supplier-submission issues. Campus users should submit an Optimize ticket when assistance must be escalated; suppliers should follow CSU Supplier Resources guidance.

After-the-fact requisitions

Direct Payment Requests were discontinued in February 2026. After-the-fact purchases must be submitted through a requisition with "AFTER-THE-FACT" entered in the Reference field. A complete, signed justification memo is required.

The memo must include	Why it matters
Circumstances that caused the transaction	Documents what occurred.
Remediation to prevent recurrence	Shows the process correction.
Department MPP/approver signature	Confirms management review.

SUBMISSION REQUIREMENT

A requisition with an incomplete justification memo will be returned to the requester.

Chartstring coding

- Commodity codes beginning with 7 are reserved for Restricted Use Direct Pay transactions.
- Select the most applicable active commodity code; avoid Direct Purchase or inactive options when another appropriate code exists.
- Account overrides may be used when an account does not populate for the relevant good or service.
- Overrides may not be used merely for generic tracking; generic override codes are being deactivated.

ProCard and support channels

- Submit ProCard requests and increases in Concur.
- Submit ProCard questions and authorizations through Optimize.
- HR oversees changes to departments and approving officials.
- Complete statement reconciliation by the end of the monthly card cycle, typically the 23rd.
- Use designated support channels; email, phone, and other informal channels will not be monitored regularly.

7. OnBase Contract Services Intake

Contract and agreement requests that are not associated with a P2P requisition or ProCard request must be submitted through the OnBase Contract Services Request Form.

What to expect	Customer action
Centralized intake	Use the OnBase form rather than email.
Required information	Include all requested details and supporting documentation.
Incomplete request	Revise and resubmit if the request is returned.
Status updates	Rely on automated email updates rather than separate status inquiries.
Processing time	Allow for queue order, complexity, and volume.

8. Fall 2026 Bursar's Office Deadlines

Date	Deadline or event	Why it matters
Aug. 1–Sept. 14	Bookstore loans available	Loans are due Oct. 16.
Aug. 11	Installment payment and new-freshman deadline	Payment milestone.
Aug. 28	100% withdrawal refund deadline	Later withdrawals may result in prorated charges.
Aug. 31–Sept. 28	Late registration	$25 fee applies; first-time registration requires hold clearance.
Sept. 11	Financial-aid deferment expires; installment due	Late fees and holds may apply after this date.
Sept. 16	Self-service installment-plan deadline	Later enrollment requires Bursar's Office assistance.
Sept. 28	Census date; add/drop deadline	Enrollment determines final aid eligibility; repayment may be required after aid disbursement.
Oct. 11	Installment payment due	Payment milestone.
Oct. 16	Bookstore loan due	Loan repayment deadline.
Nov. 4	60% point of term	Later withdrawal does not reduce registration charges.
Nov. 11	Final installment payment due	Final fall installment.
Nov. 17	Spring 2027 registration opens	Fall debt must be paid to clear registration holds.

9. Customer Action Checklist

- Use Optimize or the designated intake form for transaction-specific assistance.
- Provide a specific example, expected and actual result, impact, and recurrence when reporting a problem.
- Use the local P2P GPT for routine procedural guidance—not policy decisions or transaction determinations.
- Follow the correct hospitality attachment method for the report type.
- Update Foundation-funded Concur reports to SAFDN and the appropriate X Fund before submission.
- Attach required agendas, itineraries, or airfare comparisons to travel reports.
- Submit complete requisitions, agreements, and after-the-fact justification memoranda.
- Use OnBase for standalone contract or agreement requests.
- Watch the BPRT webpage for FAQs and new task-based job aids.
- Consider participating in the proposed Business Partners Workgroup.
- Plan around fall deadlines that affect students, holds, fees, financial aid, and registration.

Feedback and follow-up channels

Channel	Best used for
finsvcs-avp@csus.edu	Questions needing a response, follow-up, or case-specific context.
BPRT Comment Form	Anonymous themes, recurring concerns, and suggestions.
Optimize	Transaction, system, P2P, Concur, Procurement, or ProCard support.
OnBase Contract Services Request Form	Contracts or agreements not tied to a P2P requisition or ProCard request.

NEXT REVISION

This draft reflects only the four PowerPoint presentations and their available speaker notes. The Zoom transcript, chat, and Q&A should be incorporated next to capture clarifications, live examples, commitments, unresolved questions, and assigned follow-up.