

CISA Business Services Guide

Purchase Request

1. Uses:
 - a. Ordering goods and services
 - b. Membership fees/dues
 - c. Local conference registration fees
 - d. Gift card purchases (both electronic and physical cards)
 - e. Payments to ASU departments (ASU Catering, Print Lab, etc.)
 - f. Invoices that can be paid by P-Card
2. Documentation needed:
 - a. Purchase Request Sheet
 - i. Available on the [CISA Employee Support Page](#)
 - b. Approval
 - i. required if you do not have budget authority over the funding source
 - ii. not required if using your Professional Development/Travel Funds allocation
 - c. Description of a public purpose
 - i. 2-3 sentence explanation of how this purchase will benefit your program or department
 - ii. Required to support the purchase during audit review
 - iii. See FIN 119 in the [ASU Policy Manuals](#) for examples
 - d. Additional forms (if applicable)
 - i. Food-related purchases need a completed [Business Meals Form](#) with the attendees listed (attach an additional sheet if necessary)
 - ii. Quote or Invoice
 - iii. Software purchases need a current software review- see [CISA Technology Support](#)
3. Procedure:
 - a. Complete the CISA Business Service Request Form on the [CISA Employee Support Page](#) with the following:
 - i. Documentation outlined above
 - ii. Account to be charged
 - iii. Location for delivery (if ordering physical items)
 - b. After review, Finance team member will purchase items via Workday or P-Card and will update you with the expected delivery date and tracking numbers (if available)
 - c. Once the items are delivered, if anything is missing or damaged, please contact the Finance team member.

Reimbursement Request

1. Uses:
 - a. Goods and services purchased with personal funds
 - b. Business meal reimbursements
 - i. Meals should cost \$40 or less per person
 - ii. Tip may not exceed 20% of the total cost of the meal including taxes

- iii. Alcohol purchases prohibited
 - c. In-state mileage and parking expenses. (Travel expenses including out-of-state conference registration, should be managed through the My ASU Trip/Concur system.)
- 2. Reimbursement policy guidelines:
 - a. Limited to \$1,000
 - b. Must be submitted within 60 days of purchase.
 - c. Amazon is a restricted supplier- Purchases should be made by the Finance team; please submit a purchase request.
 - d. Gift cards are restricted - Purchases should be made by the Finance team; please submit a purchase request.
- 3. Documentation needed:
 - a. Receipt(s) showing:
 - i. Date of purchase
 - ii. Paid in full (no balance due)
 - iii. Proof of payment – if your name does not appear on the receipt, you will need to include either 1) a picture of the card charged on the receipt (edited to show only your name, the expiration date, and the last four digits of the card) or 2) a redacted bank statement showing only the transaction and your name on the account.
 - iv. Itemization- details of all items purchased and any taxes or fees. If the receipt does not clearly indicate the type of item(s) purchased (for example, only SKU numbers listed), please attach a separate list of the product name(s).
 - b. Reimbursement Request Sheet
 - i. Available on the [CISA Employee Support Page](#)
 - c. Approval
 - i. required if you do not have budget authority over the funding source
 - ii. Not required if using your Professional Development/Travel Funds allocation
 - d. Description of a public purpose
 - i. 2-3 sentence explanation of how this purchase will benefit your program or department
 - ii. Required to support the expense during audit review
 - iii. See FIN 119 in the [ASU Policy Manuals](#) for examples
 - e. Additional forms (if applicable)
 - i. Food-related purchases need a completed [Business Meals Form](#) with the attendees listed (attach an additional sheet if necessary)
 - ii. In-state mileage, parking fees, or rideshare expenses need a completed [In-state mileage reimbursement form](#) along with printed directions using Google Maps to support mileage calculation (mileage support not needed for travel between ASU campuses).
- 4. Procedure:
 - a. Submit the CISA Business Services Request Form found on the [CISA Employee Support Page](#) with all necessary documentation.
 - b. Finance team will create an Expense Report for you in Workday
 - c. Log into [Workday](#) to review and approve your Expense Report
 - d. After final approval, payment will be sent by the method you have on file with ASU

Invoice Payment in Workday

1. Uses:

- a. Invoices that cannot be paid by P-Card (invoices total over \$10,000, cards not accepted by the vendor, extra fee for paying by card, or items on the [P-card restricted purchases list](#))
 - b. Payment for goods and services already ordered and received without a prior Purchase Order
 - c. Not considered standard business practice per ASU policy- preferred practice is to create a Purchase Order prior to receiving goods or services
2. Documentation needed:
- a. Approval-
 - i. required if you do not have budget authority over the funding source
 - b. Description of a public purpose
 - i. 2-3 sentence explanation of how this purchase benefitted your program or department
 - ii. Required to support the purchase during audit review
 - iii. See FIN 119 in the [ASU Policy Manuals](#) for examples
 - c. Additional forms (if applicable)
 - i. Food-related invoices need a completed [Business Meals Form](#) with the attendees listed (attach an additional sheet if necessary)
 - ii. Software purchases need a current software review- see [CISA Technology Support](#)
 - d. Invoice
3. Procedure:
- a. Complete the CISA Business Service Request Form on the [CISA Employee Support Page](#) with the following:
 - i. Documentation outlined above
 - ii. Account to be charged
 - iii. Pay an Invoice Questionnaire responses (included in form)
 - b. Finance team member will create requisition or pay with P-Card and contact you if any additional documentation is needed