Directions for the Gift Preauthorization request Form

Pre-authorization is required for all gift cards and many other gifts.

Refer to the Hospitality Policy on the Payment and the gift matrix below to determine if pre-authorization is required.

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Type of Gift</th>
<th>State Funds (BKCMP)</th>
<th>* Auxiliary Funds</th>
<th>Trust Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>Gift Cards/Certificates</td>
<td>Not allowed</td>
<td>Not allowed</td>
<td>Not allowed</td>
</tr>
<tr>
<td></td>
<td>Tangible Gifts @</td>
<td>No preauthorization required; use a ProCard or a Direct Pay</td>
<td>No preauthorization required; use a ProCard or a Direct Pay</td>
<td></td>
</tr>
<tr>
<td>Students and Visitors</td>
<td>Gift Cards/Certificates # $</td>
<td>Preauthorization required; should be charged on a ProCard</td>
<td>Preauthorization required; should be charged on a ProCard</td>
<td>Preauthorization required; should be charged on a ProCard</td>
</tr>
<tr>
<td></td>
<td>Tangible Gifts @</td>
<td>No preauthorization required; use a ProCard or a Direct Pay</td>
<td>No preauthorization required; use a ProCard or a Direct Pay</td>
<td>No preauthorization required; use a ProCard or a Direct Pay</td>
</tr>
</tbody>
</table>

INSTRUCTIONS FOR THE FORM:

Enter the email address of at least 2 people (in this order):

1. Contact – The person filling in the form (will be contacted with questions)
2. Appropriate Approver— (i.e., Dean, Department Chair, Administrator or Principal Investigator). **If charging a grant, the Principal Investigator’s approval is required here.**

There may be additional signatures required. **If so, add them in this order:**

3. If Approver 1 doesn’t have signature authority for the chartfield being used, add an approver with signature authority as Approver
4. If the gifts are for Human Subjects Research, IRB approval is required:
   a. Fill in the Protocol Number and Title of Project and
   b. Add gparnell@csub.edu as an approver.
5. Grants Post-Award approvals are required if the funding source is a grant (all BKSPA funds and all “SC” funds in BKCMP except SC9##).
   a. Route to your grants analyst first (or to spapostaward@csub.edu if you don’t know who your analyst is and
   b. If the amount requested is $3,000 or more, also add mthornsberry@csub.edu for the SPPA Director’s approval.

The form will automatically route to Procurement for review, and a completed copy will be sent to all signers.