

ERG Event & Purchase Forms

Type of purchase Forms required	Hospitality Justification Form	Catering Waiver	Invoice (itemized)	Itemized Receipt	Guest-Speci al Lecturer Payment Request	Proof of insurance	See notes
Guest / keynote speaker					✓	✓	1, 9
Food purchase:							
Catering by Aztec Shops	✓		✓				2, 3
Catering by vendor other than Aztec Shops (delivered and/or Served on campus)	✓	✓	✓	✓		✓	2, 4, 6, 7, 10
Food consumed on-site (e.g., meeting at a restaurant)	✓			✓			2, 5, 6, 7
Food purchased / picked up	✓	✓		✓			2, 4, 6, 7
Merchandise							
Logo or promotional items (table covers, sticker, etc.)	✓		✓	✓			2, 7, 8
Craft / activity or other non- office supply items	✓		✓	✓			2, 7
Office supplies (non-logo pens, paper, tape, etc.)							7
Services or performer (DJ, etc)	*	*	*	*	*	✓	9, 10
Room Rental			✓				11

1. **Guest-Special Lecturer Payment Request form.** The Guest-Special Lecturer Payment Request form and Guest-Special Lecturer Checklist may be found on the Accounts Payable intranet, under General Forms. Note, the Guest-Special Lecturer Payment Request form may not be used to pay SDSU employees or students. Previous SDSU employees must have been separated for at least one year before they can be paid via the Guest-Special Lecturer Payment Request form.
2. **Hospitality Justification form (HJF).** This form must be completed to support the purchase of any items / services considered Hospitality. This includes food, logo / promotion items, items to be give in appreciation, craft / activity supplies, and most team-building activities that require payment. Basically, if it is not a basic office supply (non-logo pens, paper, toner, etc., then it probably needs a Hospitality Justification form).

The Hospitality Justification Form also requires that guests / attendees be listed. For a luncheon, that should be individual attendees. For open invitation meetings (such as ERG events), it could be listed as ERG members. For larger events, such as tabling, a more broad description, such as SDSU students, faculty, staff and the campus community are appropriate.

Please note, the purpose of the Hospitality Justification Form is to justify the items being purchased, not just the event. Please be sure to include specific justification as to how the items being purchased serve a business purpose and benefit the university. **The Hospitality Justification form must be completed / approved prior to any expense being incurred.** Please note that on the form, for the signature of Preparer's Supervisor, this must be the Preparer's actual supervisor. Or, you can forward the unsigned HJF to the ERG Coordinator to route for SACD signatures / approval

Food Purchases

3. Payment to Aztec Shops Catering will be made directly by AP / Direct Payment form.
4. A **Catering Waiver** is required to bring any outside caterer, or donated or purchased food items on to campus. **Please allow a minimum of 4 weeks** for Catering to process the form from the time Catering receives the completed form (must include detailed quote / invoice from proposed vendor, or itemized list if purchased from grocery, etc.) Generally, any insurance or EHS requirements will be addressed as part of completing the Catering Waiver application. A catering waiver is required for food purchases from campus-partner food establishments.
5. If food is consumed off campus (e.g., a lunch meeting at a restaurant), a Hospitality Justification is required, but a Catering waiver is not. However, if you purchase food from a restaurant or grocery store, etc., both the Hospitality Justification and Catering waiver are necessary.
6. For food purchases in general. All receipts for food purchase must be itemized (ie, the credit card slip only showing the total is not acceptable). Alcohol is not an allowable purchase. If individuals wish to purchase alcohol, it should not be included on the ERG-funded receipt. The maximum tip is 20%.
7. **Payment processes.** Whenever possible, an SDSU procurement credit card should be used for purchases. This includes on-line purchases and catering from campus partners, as well as off-campus partners if possible (phone payment for a pick up order, for example), or purchases at the campus Bookstore. ERG members should not pay out of pocket and request reimbursement unless that is the only option – for example, a lunch meeting at a restaurant where the total isn't know until the end of the event. Generally we may not purchase supplies, items or services (ie, anything) from SDSU students, faculty or staff (this doesn't include reimbursements for out of pocket expenditures). Also, generally does not pay deposits in advance.

Note – only Contract and Procurement Management (CPM) buyers may sign any form of agreement or contract with non-SDSU vendors. Any agreement requiring CPM approval / signature must be submitted at least 3 weeks in advance. ERG members may under no circumstances sign any agreement or contract, including catering contracts. Agreements such as room rental on campus (AS) or Aztec Shops catering generally require a FAH (Fiscal Authorization Hierarchy). Please forward any agreement requesting signature to the ERG coordinator for approval / signature.

- 8. Logo items.** Logos used to promote campus organizations and / or that contain references to SDSU must be approved and conform to campus policy. Approval is required before any logo items are purchased.
- 9. Services / performances.** When purchasing services, requirements / processes can vary depending on the type and location of services. Most general services under \$1,000 may be purchased on an SDSU Procurement Credit Card. Some services, such as Photography or Musicians may be purchased using a Guest-Special Lecturer Payment Request form. If the service is performed on campus, then the ERG must ensure the vendor has the minimum insurance (see Note 10) Some services, due to the amount or nature of service require a Purchase Order (please allow at least 4 weeks for a Purchase Order to be created). In general, ERGs may not pay students, faculty or staff for services. If you have any questions about purchasing services, please reach out to the ERG Coordinator.
- 10. Insurance requirement for off-site vendors performing services on campus.** Any vendor coming on to campus must have the minimum liability insurance (see Risk Management link). It is the responsibility of the group hiring the vendor to ensure that the vendor provides proof of insurance before the vendor performs any services on campus or any expenses are incurred.
- 11. Room Rental.** On-campus room rental for an event is paid via direct payment from AP to AS via a Room Rental Agreement. A Hospitality Justification is not required for room rental. An HJF would be required if food were served, or other items were purchased that require an HJF. For Room Rental, please forward the Agreement to the ERG Coordinator for further approval / processing.