IRA Transition Meeting
Stateside Transition

September 7, 2023
8:30 am – 10:00 am
SGMH 3230 (CBE-O’Brien Room)
Introduction and Welcome

Presented by: VP Porter and VP Dabirian
IRA Transition Meeting

- ACADEMIC AFFAIRS
- IRA-ASI
- BUDGET
- ACCOUNTING SERVICES
- PROCUREMENT SERVICES
- ACCOUNTS PAYABLE
- TRAVEL
- STUDY ABROAD
- RISK MANAGEMENT
- HUMAN RESOURCES
- POSITION MANAGEMENT
- PROCESSING TIMELINES
- DEPARTMENT CONTACTS AND RESOURCES
TRAINING TO ACADEMIC UNITS

Why Transition?

Date: May 05, 2023
To: Campus Employees
From: Alexander Porter
   Vice President for Administration and Finance/CFO
Subject: ASI IRA Transition to State Announcement

Effective July 1, 2023, the fiscal administration portion of the Instructionally Related Activities (IRA) program will transition from Associated Students, Inc. (ASI) to the Division of Administration and Finance (AF). For fiscal year 2023/24, the committee oversight and awarding process will still be managed within ASI.

The fiscal administration is transitioning to management by AF to increase operational efficiency for both ASI and AF. I would like to extend my thanks to our partners in ASI for their historical leadership in managing these funds and their partnership in this transition.
CHANGES WITH TRANSITION

• One stateside process – no longer multiple sets of policies and procedures (ASI, ASC, Stateside)
• Students will no longer pay out of pocket for travel/course related expenses
• Program budgets allocated to departments prior to the start of each fall semester
• Budget, expenses, and balances accessible via OBIEE
• No more budget/expenses transfers or chargebacks between ASI – ASC – Stateside
• Multiple levels of support: department, college-level, Provost, and campus partners
 IRA – ASI

Presented by: Susan Collins
IRA EXISTING POLICIES

Existing (No Change)

- Application and program proposals for new funding
- IRA Committee approves/awards programs
- IRA Committee still approves change requests to approved budgets (line item transfers)

<table>
<thead>
<tr>
<th>Committee Meeting Dates:</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/29/23</td>
</tr>
<tr>
<td>10/6/23</td>
</tr>
<tr>
<td>10/27/23</td>
</tr>
<tr>
<td>11/17/23</td>
</tr>
</tbody>
</table>

- IRA summary reports are due 30 days after the close of your program activity. The final date for submission of your report is July 30, 2024. InfoReady will send reminders at the end of the semester and at year end.
IRA USE OF FUNDS

IRA funds cannot be used for the following:

• Athletics grants
• Purchase or rental of films as instructional aids
• Publications designed primarily to inform or entertain (other than periodic newspaper and laboratory experiences related to journalism and literary training)
• Non-recurring maintenance and repair and capital improvement projects
• Faculty and professional staff salaries and other forms of compensation normally funded through the University’s instructional program
• IRA will not directly reimburse students for instructionally related activities expenses
• IRA will not reimburse faculty/staff for payments made to vendors for services performed or goods purchased where CSUF is obligated to report such payment to the IRS on form 1099
IRA POST AWARDS ORIENTATION  
(ETC)

Have you completed this (20 minute) training/orientation?

Activity Name: IRA Post Awards Orientation

- Training setting recommendations:
- Use the Chrome browser
- Clear cache and cookies
- Leave the progress window open
- Please see Online Training Tips and Recommendations for details

Questions:

Assignment questions: IRA Funding Office: Susan Collins
irafunding@fullerton.edu  657-278-7456

Technical questions: please email employeetrainingcenter@fullerton.edu
Budget

Presented by: Joe Lipnisky
CAMPUS BUDGET PROCESS

• The IRA Committee approves all Budget Policies
• Budget Allocations are approved by the IRA Committee
• The new Fiscal Year IRA Budget Allocations will be loaded into CFS after the campus Carryforward is completed
• All Standard OBIEE reports will be available
• The IRA Budget Allocations will be included in the Quarterly Projection reporting
Use Approved State Accounts from the campus website:

https://financialservices.fullerton.edu/documents/ASI_Account_Mapping_to_State.pdf

Sample:

<table>
<thead>
<tr>
<th>Old - IRA Expense Account</th>
<th>New - CSUF Account &amp; Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8047 Hospitality - Student Awards</td>
<td>660090 (Expenses-Other)</td>
</tr>
<tr>
<td></td>
<td>660822 (Business-Related Food)</td>
</tr>
<tr>
<td></td>
<td>660837 (Promotional Items)</td>
</tr>
<tr>
<td>8050 Supplies</td>
<td>660825 (General Supplies)</td>
</tr>
<tr>
<td>8051 Printing</td>
<td>660002 (Printing)</td>
</tr>
<tr>
<td>8051 Advertising</td>
<td>660826 (Advertising)</td>
</tr>
<tr>
<td>8053 Professional Services</td>
<td>660003 (General Services)</td>
</tr>
<tr>
<td>8069 Student Wages</td>
<td>601303 (Student Assistant)</td>
</tr>
<tr>
<td>8071 Transport/Mileage/Toll/Parking</td>
<td>606001 (Travel-In State)</td>
</tr>
<tr>
<td>8076 Lodging/Meals</td>
<td></td>
</tr>
<tr>
<td>8077 Travel</td>
<td></td>
</tr>
<tr>
<td>8551 Speakers</td>
<td>660832 (Honorariums)</td>
</tr>
</tbody>
</table>
BUDGET TRANSFER REQUEST PROCESS

Line Item Transfers need to be approved by IRA Committee and the College/Department is responsible for the IRA award.

All approved Transfer need to be completed on the Budget Transfer Request (BTR) workflow form:

https://financialservices.fullerton.edu/budget/forms/Default.php
REQUESTING SYSTEM ACCESS

Adobe Experience Manager (AEM)
Workflow Inbox
DELEGATION OF AUTHORITY (DOA)

California State University, Fullerton
Delegation of Authority Form

Use this form to delegate administrative responsibilities in connection with departmental financial transactions

<table>
<thead>
<tr>
<th>Employee Information</th>
<th>Form ID</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Employee ID: (CWID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* First Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Last Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Department Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Division</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Campus Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Campus ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Campus Extension</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Appropriate Administrator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Permanent □ Temporary</td>
<td>If Temporary, List Appointment End Date</td>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>

The delegation will remain in effect until one of the following occurs: (1) The delegation is reassigned by the Responsible Person to another individual. (2) The delegate leaves the department or the University. (It is the responsibility of the delegate to inform the Financial Services (via email to PL-DOA@fullerton.edu) if they will no longer serve as the delegate). (3) Responsible Person changes such as reassignment by the Division Head or by personnel changes (Dept. Chair changes, etc.). A new delegation form will need to be submitted to Financial Services located at CP-309. (It is the responsibility of the Responsible Person to inform the Financial Services Program if they will no longer serve as the Responsible Person for the department(s) listed above.

* Account Action Request:
  - □ New User □ Existing User □ Remove All Access
# Finance System Access Request Form

### Employee Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID (CWID)</td>
<td>* Employee ID (CWID)</td>
</tr>
<tr>
<td>Campus Email</td>
<td>* Campus Email</td>
</tr>
<tr>
<td>First Name</td>
<td>* First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>* Last Name</td>
</tr>
<tr>
<td>Department Name</td>
<td>* Department Name</td>
</tr>
<tr>
<td>Department ID</td>
<td>* Department ID</td>
</tr>
<tr>
<td>Title</td>
<td>* Title</td>
</tr>
<tr>
<td>Campus Extension</td>
<td>* Campus Extension</td>
</tr>
<tr>
<td>Division</td>
<td>* Division</td>
</tr>
<tr>
<td>Campus Location</td>
<td>* Campus Location</td>
</tr>
<tr>
<td>Appropriate Administrator</td>
<td>* Appropriate Administrator</td>
</tr>
<tr>
<td>Faculty</td>
<td>Faculty</td>
</tr>
<tr>
<td>Staff</td>
<td>Staff</td>
</tr>
<tr>
<td>Management</td>
<td>Management</td>
</tr>
<tr>
<td>Student</td>
<td>Student</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
<tr>
<td>Permanent</td>
<td>Permanent</td>
</tr>
<tr>
<td>Temporary</td>
<td>Temporary</td>
</tr>
</tbody>
</table>

### Finance Roles

- If Temporary, List Appointment End Date: mm/dd/yyyy

### Access and Compliance Form

- New User
- Existing User
- Change Department(s)
- Remove All Access

### Role Description Reference

<table>
<thead>
<tr>
<th>Approval Status</th>
<th>Form ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td></td>
</tr>
</tbody>
</table>
OBIEE – BUSINESS INTELLIGENCE DASHBOARDS (Finance System)

Rev/Exp (CFS)
- Revenue/Expense Summary Report
- Budget Detail
- Actuals Detail (between Accounting Periods) Report
- Encumbrance Detail *(Open Purchase Orders)*
- Pre-Encumbrance Detail *(Open Requisitions)*
YEAR END PROCESS

An IRA Budget Allocation can be declared complete anytime during the year and any remaining balance can be returned to the committee IRA balance.

All expenses to be charged to the IRA Budget Allocation need to be accrued before the Fiscal Year End.

After year end any remaining Carry-forward will be moved to the IRA committee.
Accounting Services

Presented by: Lynn Ganac and Justin Chan
NEW CHARTFILED STRING

Fund:
TA002 Instructionally Related Activities (IRA)

Mandatory CFS Chartfield String:
Account + Fund (TA002) + Dept + Program (4-Digit)
NOTE: Class code is no longer required

NOTES:
- Class code is no longer required
- Program code is required when using fund TA002 (similar to SSFGF)

IMPORTANT: Department is responsible for managing TA002 balances by account and program (negative BBA = overspent budget)
## REFERENCE IRA BUDGET SHEET
### Account, Dept, Program Codes

<table>
<thead>
<tr>
<th>Prog Code</th>
<th>College</th>
<th>IRA Program Name</th>
<th>Dept ID</th>
<th>Budget</th>
<th>8047 Hospitality</th>
<th>8050 Supplies</th>
<th>8051 Printing and Advertising</th>
<th>8053 Professional Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>3201</td>
<td>CCOM</td>
<td>Daily Titan</td>
<td>11249</td>
<td>$119,600.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3202</td>
<td>CCOM</td>
<td>Comm Week</td>
<td>11249</td>
<td>$19,600.00</td>
<td>$5,100.00</td>
<td>$4,000.00</td>
<td>$5,500.00</td>
<td></td>
</tr>
<tr>
<td>3203</td>
<td>CBE</td>
<td>Titan Capital Management</td>
<td>10401</td>
<td>$24,000.00</td>
<td></td>
<td></td>
<td>$5,500.00</td>
<td></td>
</tr>
<tr>
<td>3205</td>
<td>HHD</td>
<td>HUSR Global Internship Program</td>
<td>10138</td>
<td>$37,500.00</td>
<td></td>
<td></td>
<td>$5,500.00</td>
<td></td>
</tr>
<tr>
<td>3206</td>
<td>HSS</td>
<td>Journey in Advocacy</td>
<td>10068</td>
<td>$10,500.00</td>
<td></td>
<td></td>
<td>$5,500.00</td>
<td></td>
</tr>
</tbody>
</table>

- **Stateside account code you will use effective 7/1/23**
- **ASI code longer used - maps to stateside account you will use effective 7/1/23**
# Account Mapping

Use Approved Budgeted State 6xxxx Accounts

[https://financialservices.fullerton.edu/documents/ASI_Account_Mapping_to_State.pdf](https://financialservices.fullerton.edu/documents/ASI_Account_Mapping_to_State.pdf)

<table>
<thead>
<tr>
<th>IRA Expense Account (Do not use after 06/30/2023)</th>
<th>CSUF Account &amp; Description (Use after 06/30/2023)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>8047 Hospitality - Student Awards</td>
<td>660090 (Expenses-Other)</td>
<td>D11**: Items of tangible personal property given in recognition of service or achievements directly benefiting the University. Ex. Students are required to present and graded and are given awards; submit D11 form.</td>
</tr>
<tr>
<td>8047 Hospitality - Food and Beverage (Excluding Alcohol)</td>
<td>660322 (Business-Related Food)</td>
<td><strong>D11</strong>: Food and beverage at Events Attended by Official University Guests. Ex. Students have events where they are presenting or having a session with a top leader of the event and bring food (students are considered university guests when using IRA funds).</td>
</tr>
<tr>
<td>8047 Hospitality - Promotional Materials</td>
<td>660837 (Promotional Items)</td>
<td><strong>D11</strong>: Gifts. Items of nominal value and bear the University logo or other University symbol distributed to promote the name or image of the University, provide information, or enhance University productivity. Ex. T-shirts, name badges for students.</td>
</tr>
<tr>
<td>8050 Supplies</td>
<td>660825 (General Supplies)</td>
<td>Ex. Daily Titan to print the magazine.</td>
</tr>
<tr>
<td>8051 Printing</td>
<td>660002 (Printing)</td>
<td>Ex. Advertising for the cost of any kind of advertising, including routine personnel vacancy announcements; flyers/banners NOT allowed.</td>
</tr>
<tr>
<td>8053 Advertising</td>
<td>660003 (Advertising)</td>
<td>Department can submit Budget Transfer Request to move budget from 600001 (Travel-In State) to 600002 (Travel-Out of State) or 600802 (Travel-International).</td>
</tr>
<tr>
<td>8070 Professional Services</td>
<td>66003 (General Services)</td>
<td></td>
</tr>
<tr>
<td>8079 Student Wages</td>
<td>660133 (Student Assistant)</td>
<td></td>
</tr>
<tr>
<td>8071 Transport/Meal/Toll/Parking</td>
<td>660001 (Travel-In State)</td>
<td></td>
</tr>
<tr>
<td>8071 Lodging/Meals</td>
<td>660001 (Travel-In State)</td>
<td></td>
</tr>
<tr>
<td>8077 Travel</td>
<td>660002 (Travel-Out of State)</td>
<td></td>
</tr>
<tr>
<td>8077 Travel</td>
<td>660002 (Travel-Out of State)</td>
<td></td>
</tr>
<tr>
<td>8078 Rentals for Special Events</td>
<td>66001 (Facility Rental)</td>
<td></td>
</tr>
<tr>
<td>8079 Dues &amp; Subscriptions</td>
<td>660003 (General Services)</td>
<td></td>
</tr>
<tr>
<td>8079 Dues &amp; Subscriptions</td>
<td>660003 (General Services)</td>
<td></td>
</tr>
<tr>
<td>8079 Dues &amp; Subscriptions</td>
<td>660003 (General Services)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660800 (Facility Rental)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660800 (Facility Rental)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660802 (Special Event Insurance Costs)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660802 (Special Event Insurance Costs)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660802 (Special Event Insurance Costs)</td>
<td></td>
</tr>
<tr>
<td>8080 Staff Development</td>
<td>660802 (Special Event Insurance Costs)</td>
<td></td>
</tr>
<tr>
<td>8080 Insurance</td>
<td>660016 (CSURMA Property Lieb Ins Prem)</td>
<td></td>
</tr>
<tr>
<td>8080 Insurance</td>
<td>660016 (CSURMA Property Lieb Ins Prem)</td>
<td></td>
</tr>
<tr>
<td>8096 Royalties</td>
<td>660009 (Expenses-Other)</td>
<td></td>
</tr>
<tr>
<td>8152 Postage/Shipping</td>
<td>660001 (Postage and Freight)</td>
<td></td>
</tr>
<tr>
<td>8296 Software Subscription</td>
<td>660003 (IT Software Annual Maint/Supp)</td>
<td></td>
</tr>
<tr>
<td>8551 Speakers</td>
<td>660002 (Honorary)</td>
<td>New as of 07/01/2023.</td>
</tr>
</tbody>
</table>

**Hospitality (D11) Documentation and Approval Form.**

For FY 2023-24 transactions, DO NOT USE Program Code 7997 and 2xxx IRA Class Codes

USE IRA Program Codes 3xxx
REQUEST FOR INVOICE and EXPENDITURE TRANSFER REQUEST

Request for Invoice (RFI)
No: Bill ASI for IRA expenses

Expenditure Transfer Request (ETR)
No: Transfer IRA expenses from state to ASI
Yes: Correct IRA ACTUALS transactions in TA002
Need to use IRA funds for one of these services?

Use new chartfield string: TA002-dept-program

*All service provider expenses post to account 617001

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Dept</th>
<th>Description</th>
<th>Contact Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>COP</td>
<td>10:56</td>
<td>IT Copier Services</td>
<td>Lin Nguyen</td>
<td>5231</td>
</tr>
<tr>
<td>CSO</td>
<td>10235</td>
<td>Community Service Officer</td>
<td>Rachel Junn</td>
<td>4814</td>
</tr>
<tr>
<td>DIT</td>
<td>10008</td>
<td>Division of IT</td>
<td>Lin Nguyen</td>
<td>3814</td>
</tr>
<tr>
<td>DPS</td>
<td>10200</td>
<td>IT-Digital Print Services</td>
<td>Lin Nguyen</td>
<td>2910</td>
</tr>
<tr>
<td>FDC</td>
<td>10:15</td>
<td>FDC Graphic Design</td>
<td>Tracey Magyar</td>
<td>2841</td>
</tr>
<tr>
<td>FLT</td>
<td>10064</td>
<td>Fleet PCard</td>
<td>Cristhian Godines Jimenez</td>
<td>3829</td>
</tr>
<tr>
<td>HBC</td>
<td>10:37</td>
<td>HR Background Check</td>
<td>Phenicia McCullough</td>
<td>4637</td>
</tr>
<tr>
<td>INF</td>
<td>10368</td>
<td>Infrastructure Rch Ctr</td>
<td>Christina Yanez</td>
<td>4488</td>
</tr>
<tr>
<td>PCD</td>
<td>10064</td>
<td>Procurement Card Program</td>
<td>Cristhian Godines Jimenez</td>
<td>3829</td>
</tr>
<tr>
<td>PHY</td>
<td>10:84</td>
<td>Physical Plant W/O</td>
<td>Marilyn De La Cruz</td>
<td>2518</td>
</tr>
<tr>
<td>PLS</td>
<td>10235</td>
<td>University Police LiveScan</td>
<td>Rachel Junn</td>
<td>4814</td>
</tr>
<tr>
<td>POS</td>
<td>10:57</td>
<td>Postage</td>
<td>Ruben Cornel</td>
<td>2533</td>
</tr>
<tr>
<td>PRO</td>
<td>10:81</td>
<td>Daily Parking Permits</td>
<td>Marisela Delgadillo</td>
<td>3087</td>
</tr>
<tr>
<td>RPO</td>
<td>10235</td>
<td>Request for Police Officer</td>
<td>Rachel Junn</td>
<td>4814</td>
</tr>
<tr>
<td>SED</td>
<td>10:81</td>
<td>Special Event Daily</td>
<td>Reggie Tumbow</td>
<td>7361</td>
</tr>
<tr>
<td>SEM</td>
<td>10:81</td>
<td>Special Event Misc Rch Ctr</td>
<td>Reggie Tumbow</td>
<td>7361</td>
</tr>
<tr>
<td>SPK</td>
<td>10:81</td>
<td>Special Parking</td>
<td>Marisela Delgadillo</td>
<td>3087</td>
</tr>
<tr>
<td>STP</td>
<td>10064</td>
<td>Staples</td>
<td>Cristhian Godines Jimenez</td>
<td>3829</td>
</tr>
<tr>
<td>TEL</td>
<td>10220</td>
<td>Telecommunications</td>
<td>Christina Yanez</td>
<td>4488</td>
</tr>
<tr>
<td>UTL</td>
<td>10342</td>
<td>Utilities</td>
<td>Marilyn De La Cruz</td>
<td>2518</td>
</tr>
</tbody>
</table>
PRIOR YEAR BALANCES

Post FY 2022 transactions in:

**Fund:** TA002

**Department:** 10021 (DOA for 10021 will be used)

**Program:** 7997* (ASFR will NOT generate invoice to ASI)

**Class:** 2xxxx

* For Purchase Orders that were carried forward to FY 2023

ASFR will reconcile FY 2022 balances with ASI and reclassify to the correct chartfield: TA002-10021-IRA program
Procurement Services

Presented by: Alex Rosales
FY 2023 REQUISITIONS

To ensure that your Requisitions get processed in a timely manner, ensure that the following required items are done:

1. The vendor is NEW in CSUF system: https://financialservices.fullerton.edu/controller/ap_travel/services/payments/NewVendorRequest.php

2. Vendor has provided an updated Quote and Insurance

3. If it is software or computer purchase ensure that an IT Request is completed for a RITM #: https://www.fullerton.edu/itpurchasing/

Allow 3-4 weeks
## FY 2023 REQUISITIONS

### CFS Requisition Requirements

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Final Purchase Dollar Amount</th>
<th>Minimum Quote Requirements</th>
<th>Additional Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commodities (i.e. furniture, lab equipment)</td>
<td>Less than $50k</td>
<td>One Quote</td>
<td>SmartSheet-PaymentWorks, Valid quote within last 30 days, Purchase can possibly be made via P-card</td>
</tr>
<tr>
<td></td>
<td>Equal to or Greater than $50k and Equal to or Less than $100k</td>
<td>3 or more quotes from different vendors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greater than $100k</td>
<td>Formal Bid per ICSUAM Policy</td>
<td></td>
</tr>
<tr>
<td>Information Technology (i.e. computers, software subscriptions)</td>
<td>Less than $50k</td>
<td>One Quote</td>
<td>IT Authorization Number must be obtained prior to submitting Requisition, Vendor SmartSheet - PaymentWorks, Valid quote within last 30 days, Purchase can possibly be made via P-Card</td>
</tr>
<tr>
<td></td>
<td>Equal to or Greater than $50k and Equal to or Less than $500k</td>
<td>3 or more quotes from different vendors</td>
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<tr>
<td></td>
<td>Greater than $500k</td>
<td>Formal Bid per ICSUAM Policy</td>
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# FY 2023 REQUISITIONS

CFS Requisition Requirements Continued...

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Final Purchase Dollar Amount</th>
<th>Minimum Quote Requirements</th>
<th>Additional Requirements</th>
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<tbody>
<tr>
<td>Services (i.e. editing, installation, maintenance)</td>
<td></td>
<td></td>
<td>• Vendor SmartSheet - PaymentWorks</td>
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<td>Less than $50k</td>
<td>One Quote</td>
<td>• Valid quote within last 30 days</td>
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<td>Equal to or Greater than $50k and Equal to or Less than $100k</td>
<td>3 or more quotes from different vendors</td>
<td>• Insurance documentation</td>
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<td>Greater than $100k</td>
<td>Formal Bid per ICSUAM Policy</td>
<td>• SETC/ADA Compliance</td>
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<tr>
<td>Promotional Items (i.e. Public Identity, Image Gear, Vail Dunlap)</td>
<td>P-Card can be used but it must be a vendor listed on the C&amp;P website or Certified DVBE/SBE Vendor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zero Dollar Agreements (i.e. Service Learning, Clinical, Student Teaching, Internships, IT Software License, Athletic)</td>
<td></td>
<td>• No requisition required</td>
<td>• Contract Request Form (CRF) must be submitted to <a href="#">C&amp;P Inquiry Form</a></td>
</tr>
</tbody>
</table>
FY 2023 REQUISITIONS

Requisition Date should be EQUAL TO or GREATER THAN 07/01/2023
PCards or Declining Balance Cards

• A PCard is the preferred method for purchasing – quickest turnaround

• Review the IRA budget sheet to ensure department coordinators and faculty listed have a PCard (One-Card, STDB, or Instant Card)

• If department coordinators (staff) need a PCard, submit applications now

• If faculty need a PCard issued, submit applications as soon as they return from summer break

• If you’re using a short-term declining balance card, all transactions must be processed by June 30. IRA program balances do not carry forward to the next year.

Allow 2-3 weeks
PCards or Declining Balance Cards

Procurement cards provide benefits that include:

- Streamlines the processes for small dollar orders, reduces invoices and payments;
- Enables employees to be more efficient and focus on their core missions;
- Provides cost savings through consolidated payments to the procurement card company; and
- Enables faster payments to CSU vendors.

PCard applications: https://financialservices.fullerton.edu/cp/forms/

A single system-wide procurement card contract and related program will be administered by the Chancellor’s Office department of Contract Services and Procurement.

Allow 2-3 weeks
PCards or Declining Balance Cards

The Procard should NEVER be used for:

- Personal items
- Narcotics
- Alcohol
- Medical Services
- Camp Sites
- Travel (Meals)
- Animals
- Cash Advances
- Firearms & Ammunition
- Amazon Prime Membership
PCards or Declining Balance Cards

When to Submit a CFS Requisition

**Commodity**

Tangible goods including office supplies, furniture, equipment, computers, software, etc.

Additional Documentation:
- Quote(s)
- ICT form (ICT Form)
- EH&S approval

*Commodity Purchases over $50K must be formally bid by procurement and contracts*

**Service**

Non-tangible labor including repairs, maintenance, consulting, rentals and leases, any type of installation, speakers/lecturers, etc.

Additional Documentation:
- COI/Proof of Insurance
- Quote
- Scope of Work
- IC form
- Risk Evaluation

*Service Orders over $50K must be formally bid by procurement and contracts*

**Public Works**

Construction, alteration, repair or improvement of any public structure, building, road or other public improvement of any kind.

Additional Documentation:
- Various...don’t even go there!
- Contact Procurement or Facilities with questions
INSTANT CARD

Instant Card is a temporary, virtual credit card to anyone in the organization to pay for business expenses
INSTANT CARD - STUDENT TRAVEL

- Student travel will mirror employee travel but with no out of pocket costs
  - Flights, transportation and lodging – are only permissible on state p-card (One Card)
  - Students and coaches will receive an Instant Card for items not permissible on state p-cards (meals, etc.)

- Instant Cards are issued with an approved amount, students can fully spend down their approved amount (just like Apple Pay or Google Pay)
- Admin & Finance is modeling this program after San Jose State University and US Banks model
- CSUF Instant Card program will is in place now
INSTANT CARD - STUDENT TRAVEL

• Simple to use
  • Download Instant Card to your mobile wallet for in-store purchases or securely view full card details in
    Instant Card application

• Instant access to funds
  • Funds are available to use immediately

• Fast, temporary solution
  • Easily and quickly send a virtual card to make purchases, eliminating personal card spend

• Maintain control and visibility
  • Set card limits
  • Set expiration dates
  • Merchant Category Code (MCC) controls
# INSTANT CARD – STUDENT TRAVEL

## How to Request

**Credit Card Request Form**

**Credit Card Type(s):**
- Please select one option, plus one sub-option if applicable
  - P-Card
  - Declining Balance Card
    - Short-Term
    - Vendor
  - Instant Card

**Card Holder Name:**

**CUID#:**

**Division:**

**Campus Email Address:**

**Campus Telephone:**

**Mobile/Cell Phone:**

**Campus Address:**

---

<table>
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<tr>
<th>Card Type</th>
<th>P-Card</th>
<th>Declining Balance Card</th>
<th>Instant Card</th>
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<tr>
<td><strong>Credit Card Effective Dates</strong></td>
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<td>4 years</td>
<td>1 year</td>
<td>1 year</td>
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<tr>
<th>Card Type</th>
<th>P-Card</th>
<th>Declining Balance Card</th>
<th>Instant Card</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credit Card Limits</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Single Purchase Limit:</td>
<td>$2,000</td>
<td>$4,500</td>
<td>$4,500</td>
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<tr>
<td>Card Limit:</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Monthly Limit:</td>
<td>$5,000</td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>Total Annual Requested Credit:</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
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---

**Note:** All P-Cards and Declining balance credit cards have automatic and renewing effective dates, subject to cardholder request otherwise. **All P-Card single and monthly purchase limits are automatically set at a maximum of $2,000 single purchase limit and $5,000 monthly limit; unless justification for increased limits is submitted for approval.**

**Accounting Codes**

<table>
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<th>Chartfield to be Charged:</th>
<th>Account</th>
<th>Fund</th>
<th>Dept ID</th>
<th>Program</th>
<th>Class</th>
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</thead>
</table>
INSTANT CARD – STUDENT TRAVEL

Provision cards in three easy steps

1. How much?
2. Who?
3. Send!
INSTANT CARD – STUDENT TRAVEL

How to receive and use cards

Receive Email
Add to mobile wallet
Spend!

CUSTOMER SUPPORT
Phone: 555-555-5555
Email: support@instantcard.com
Website: instantcard.com

CALIFORNIA STATE UNIVERSITY
FULLERTON
Paving the Road for Student Success
INSTANT CARD – STUDENT TRAVEL

What’s new? Accessing card number

- View full 16-digit card number with biometrics
  - Face ID (iOS)
  - Thumb Print (Android)
Independent Contractors & Service Providers

When contracting an individual as an Independent Contractor (IC) or Service Provider, our current process requires the following:

- Submit a Requisition - PeopleSoft
- Current Scope of Work
- Valid Quote with 30 day expiration
- Proof of Insurance (Certificate of Insurance and Additional Insured Endorsement)
- If supplier is new, they will need to onboarded via PaymentWorks.
- Please submit request via this link - https://app.smartsheet.com/b/form/277451bd666542aeb8e0d8b394114645

We are collaborating with our HRDI partners to enhance our current process and review policy to ensure we are in compliance with State and CSU requirements.

Future training to come

Please allow for 3-4 weeks until completion
Accounts Payable

Presented by: Alberto Contreras
An honorarium is a voluntary payment given to an individual as a token of appreciation for their participation in an activity or event for which no fee is legally or traditionally required. An honorarium payment is made as a gesture of goodwill and in appreciation to recognize or acknowledge the contribution of gratuitous services to the University, rather than as a fulfillment of an obligation. The honorarium amount is discretionary and nominal and is usually a one-time payment made to an individual for a special non-recurring activity.
HIRE HONORARIUM

When to hire an individual through an Honorarium?
An individual would meet the honorarium definition when amount to be given is NOT negotiated ahead of time. It is a gesture made to help offset travel costs and as a token of appreciation.

Honorariums should not be repetitive should occur, once per semester. Foreign individuals have additional restrictions.

Honorariums exceeding $5,000 should run through procurement

If travel expenses to be reimbursed, itemized receipts must be provided, reimbursement will be for actual costs incurred

Please allow 7-10 business days for check processing, additional time is needed if individual is US nonresident.
ACCOUNTS PAYABLE

- Payment processing for invoices or P.O.’s to be paid from IRA funds follow the same procedures as non-IRA payment requests
- Check requests should be submitted with the authorized signatures
  - Chartfield should be included on requests as discussed earlier
- Usage of IRA funds should be verified by the department approvers prior to expense being incurred
  - Department to ensure funds are being used in the appropriate manner
- If received timely, invoices are paid Net 30 from date of invoice
Travel

Presented by: Zarita Moore
UNIVERSITY REQUIREMENTS FOR TRAVEL

• Concur to be used by all state employees, student assistants (job related and non-job related).

• For CSUF Student or Student Employees (non-job related) traveling on University business, the following forms must be submitted along with the Request:
  • CSUF Waiver of Liability form
  • Student Code of Conduct Agreement form

• CSUF Student travel will continue the paper process
  • Exception: For faculty-led study abroad/away programs that operate under a formal (international) program agreement, student travel is authorized by the fully approved program agreement. A paper TR is not required, unless the student will directly receive disbursement of university funds.)
UNIVERSITY REQUIREMENTS FOR TRAVEL

• Travel request should be submitted:
  • Domestic Travel- 4 – 6 weeks prior to the departure date
  • International Travel- 6 – 8 weeks prior to the departure date

• Travel expense claim should be submitted within 60 calendar days from return date, claims submitted after this timeframe will be reimbursed but will be taxable (run through employees' payroll)
  • Claims with no issues are processed in 10 business days
Study Abroad and Global Engagement

Presented by: Shari Merrill
SAGE strives to connect its diverse community of students, faculty and staff with global opportunities that enrich their academic and professional lives and drive personal development and transformation.

ABCs Approach – Awareness, Belief, Counsel

(credit Lee Rivers, IIE, Fulbright U.S. Student Program)
STUDY ABOAD AND GLOBAL ENGAGEMENT (SAGE)

Whom do we serve and how?

• Students
  • Advising
  • Application Management
  • University Processes (Enrollment, Fin Aid, Student Conduct, Insurance Requests, etc.)
  • Pre-, During, Post-Program Support and Development

• Faculty and Staff
  • Guidance and support for all phases of Faculty-Led program coordination
  • Collaboration with colleges and department for student advising and support
    • Academic Advising
    • Financial Aid
    • Post-grad and Discipline-specific Opportunities
  • Health and Safety
  • Title IX
You can find further details on the SAGE Website: [https://extension.fullerton.edu/studyabroad/faculty-staff.aspx](https://extension.fullerton.edu/studyabroad/faculty-staff.aspx)
Human Resources, Diversity & Inclusion – Office of Risk Management

Presented by: Michael Coughlin
FIELD TRIPS

What is a Field Trip?
An off-campus group learning activity led by a faculty or staff member who travels with the group.

Here is the link to the Academic Field Trip Guidelines from the Risk Management website:

https://hr.fullerton.edu/documents/risk-management/AcademicFieldTrips.pdf
FIELD TRIPS (continued)

As a rule of thumb, the department/college should have the students sign the University’s Waiver of Liability and a Student Code of Conduct prior to the trip.

https://hr.fullerton.edu/forms/NewCSUFWaiverOfLiability.pdf

https://hr.fullerton.edu/documents/risk-management/Student%20Conduct%20Agreement.pdf
FIELD TRIPS (continued)

The department/college should also compile an emergency contact roster for attendees.

A downloadable sample of the roster can be found on the HRDI website under Risk Management forms.

Both links from the previous page can also be found in the same location.

Department/college maintains all 3 forms for 3 years after the field trip.
VOLUNTEERS

Volunteers must complete these documents and submit to Risk Management:

1. Volunteer form
   https://hr.fullerton.edu/documents/risk-management/Volunteer-Form-05202023.pdf
   Note: This is the only version accepted

2. Executive Order 1083 acknowledgment
   Viewing Mandatory Reporting of Child Abuse and Neglect (policystat.com)
Most volunteers will complete the Limited Reporter Acknowledgment (Attachment C)

3. Volunteer Release Form (required only if volunteer is a minor)

[URL]

Volunteer Form asks for a minimum of 2 weeks to process.
Common oversights that delay processing:

- Form not completely and correctly filled out.
- Parent/guardian signature missing from EO1083 acknowledgement (if volunteer is a minor).
- Driving to campus to volunteer is **not** driving on University business.

**Volunteers cannot begin until RM approves their service and they complete any needed training.**

- If the volunteer needs parking, please write “parking pass” at the top of the form.
- Please let Melanie Ortiz know if the service dates change, even if the volunteer leaves early.
Human Resources, Diversity & Inclusion - Talent Acquisition

Presented by: Tammy Dietzel
Special Consultant Appointment

When hiring an individual as a Special Consultant, follow the Quick Hire Process

Quick Hire Process Webpage where you will also find a detailed checklist for specifics of requisition entry
Special Consultant Appointment

- Helpful reminders also included in our Quick Hire process Webpage:
  - A position description is required as part of the requisition submission
  - A CMS position number is required as part of the requisition submission
  - Work may only commence after authorized from HRS is received, no retroactive start date appointments
  - Candidates must apply to the Temporary Pool for hiring
  - Candidates must submit to appropriate background check procedures prior to commencement of work
  - Candidates must physically verify documentation of eligibility to work in the United States
  - Candidates must complete work within the state of California
  - Requisition will be assessed for Faculty Additional Employment
Human Resources, Diversity & Inclusion - Position Management

Presented by: Seng Rojas
When to Complete a Student Task Profile and submit to Position Management:

- The beginning of the month prior to hiring the student.
- Prior to the 4th of the month if it is for a previous month.
- This allows time for setup and getting combo codes validated by budget.
- Allow 7 Business Days processing time from time of submission.
Required Signatures:
- Requestor
- Division HR Coordinator/College Coordinator
- Finance Manager (MPP)

Description of the Request: provide specific information, i.e., Dept ID, Fund, Program, Account, Comments: ex: xxx grant (describe what it’s for).

New naming convention per CHRS:
- Taskgroups: Ex: FL(Dept ID)
- Task Profile ID: FL(Dept ID with seq #)
Processing Timelines

Presented by: Alyssa Adamson and Bonnie Li Victorino
CONTRACT SIGNATORIES

- Only the Procurement Office has authority to sign off on Contracts

**NOTE:** *Do not* sign any Contracts or you can be personally liable
BEST PRACTICES

**DO**
- Ask for advice/pre-approval prior to purchase
- Check your balances in approved spend categories
- Check IRA balances and maximum spent for the year
- Ask questions, your team is here to help

**DON’T**
- Procure items on your own without consult or prior approval
- Sign Contracts, otherwise you are personally liable
- Purchase software/hardware may need an IT Authorization Number
- Acquire services on your own
BEST PRACTICES

Step 1: Plan Ahead - Allow for Processing Times

Step 2: Consult and work with your Colleges or Depts.

Step 3: Obtain Pre-Approvals

Step 4: Do not commit or procure vendor services on your own
PROCESSING TIMELINES

**IRA LINE ITEMS**
- 7 Business Days Prior to IRA Committee Meeting

**P-CARD**
- 2-3 weeks after paper approval

**Requisition**
- 3-4 weeks if all paperwork is submitted

**Travel**
- TRAVEL REQUESTS Submission Times prior to Travel
  - Domestic 4-6 Weeks
  - International 6-8 Weeks
- TRAVEL CLAIMS
  - Submit within 60 Days of Return
  - CLAIMS with no issues paid within 10 business days

**OBIEE ACCESS**
- 2-3 weeks after training and approval

**Instant Card**
- 2 weeks prior to Traveling

**Independent Contractors**
- 3-4 weeks if all paperwork is submitted and complete

**Accounts Payable**
- • Honorarium 7-10 Business Days, more Time for International
- • Invoices (Net 30 Days)
- • Check Requests 7-10 Business Days
Human Resources PROCESSING TIMELINES

- **Special Consultant**: 4-6 Weeks
  - When Hiring a Special Consultant, refer to the Quick Hire Process

- **Student Task Profiles**: 7 Business Days
  - After the Date of Submission

- **Volunteers**: 2 Weeks
  - Refer to Volunteer Website for Details on the Process
NEXT STEPS - RECAP

1. Complete the IRA Post Awards Orientation via ETC
2. Request OBIEE Access
3. Have P-Cards in place and ready to go
4. Instant Cards for Student Travel
5. Pre-Plan with your College or Department to ensure that there are pre-approvals in place and allow time to adhere to processing timelines.
# ACADEMIC AFFAIRS CONTACTS

## PROVOST OFFICE

Alyssa Adamson  
[aadamson@fullerton.edu](mailto:aadamson@fullerton.edu)  
(657) 278-2194

Bonnie Li Victorino  
[blivictorino@fullerton.edu](mailto:blivictorino@fullerton.edu)  
(657) 278-8825

## College Contacts

<table>
<thead>
<tr>
<th>College of the Arts</th>
<th>Extension and International Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris Johnson</td>
<td>Sharon Ting</td>
</tr>
<tr>
<td><a href="mailto:christjohnson@fullerton.edu">christjohnson@fullerton.edu</a></td>
<td><a href="mailto:sharonting@fullerton.edu">sharonting@fullerton.edu</a></td>
</tr>
<tr>
<td>(657) 278-4879</td>
<td>(657) 278-5427</td>
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<thead>
<tr>
<th>College of Business and Economics</th>
<th>College of Health and Human Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sabrina Roche</td>
<td>Nathan Van Diggele</td>
</tr>
<tr>
<td><a href="mailto:sroche@fullerton.edu">sroche@fullerton.edu</a></td>
<td><a href="mailto:nvandiggele@fullerton.edu">nvandiggele@fullerton.edu</a></td>
</tr>
<tr>
<td>(657) 278-2201</td>
<td>(657) 278-7299</td>
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</table>

<table>
<thead>
<tr>
<th>College of Communications</th>
<th>Humanities and Social Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barbara Kerr</td>
<td>Pat Balderas</td>
</tr>
<tr>
<td><a href="mailto:bkkorr@fullerton.edu">bkkorr@fullerton.edu</a></td>
<td><a href="mailto:pbaldorases@fullerton.edu">pbaldorases@fullerton.edu</a></td>
</tr>
<tr>
<td>(657) 278-4060</td>
<td>(657) 278-5026</td>
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<tr>
<th>College of Education</th>
<th>College of Natural Sciences and Mathematics</th>
</tr>
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<tbody>
<tr>
<td>Alicia Wagner</td>
<td>Amanda Villagran</td>
</tr>
<tr>
<td><a href="mailto:alwagner@fullerton.edu">alwagner@fullerton.edu</a></td>
<td><a href="mailto:avillagran@fullerton.edu">avillagran@fullerton.edu</a></td>
</tr>
<tr>
<td>(657) 278-4416</td>
<td>(657) 278-4893</td>
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<table>
<thead>
<tr>
<th>College of Engineering and Computer Science</th>
<th>Pollak Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanya Hinh</td>
<td>Deborah Douglas</td>
</tr>
<tr>
<td><a href="mailto:tahinh@fullerton.edu">tahinh@fullerton.edu</a></td>
<td><a href="mailto:dedouglas@fullerton.edu">dedouglas@fullerton.edu</a></td>
</tr>
<tr>
<td>(657) 278-8523</td>
<td>(657) 278-3896</td>
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# Administration & Finance Contacts

<table>
<thead>
<tr>
<th>College/Department</th>
<th>Contact Information</th>
</tr>
</thead>
</table>
| Accounting Services & Financial Reporting | Lynn Ganac  
  lganac@fullerton.edu  
  (657) 278-8474  
  Justin Chan  
  juschan@fullerton.edu  
  (657) 278-8371 |
| Accounts Payable                       | Alberto Contreras  
  albertocontreras@fullerton.edu  
  (657) 278-3750 |
| Contracts & Procurement                | Alex Rosales  
  alexrosales@fullerton.edu  
  (657) 278-4503 |
| Controller’s Office                    | Michael Au-yeung  
  mau-yeung@fullerton.edu  
  (657) 278-4075 |
| Resource Planning & Budget             | Joe Lipinsky  
  jlipinsky@fullerton.edu  
  (657) 278-7392  
  Raymond Juanico  
  rjuanico@fullerton.edu  
  (657) 278-4284 |
| Travel Operations                      | Alberto Contreras  
  albertocontreras@fullerton.edu  
  (657) 278-3750  
  Zarita Moore  
  zmoore@fullerton.edu  
  (657) 278-3543 |
# Human Resources Diversity and Inclusion Contacts

<table>
<thead>
<tr>
<th>College/Department</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic HR</td>
<td>Natalie Bersig</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:nbersig@fullerton.edu">nbersig@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-3824</td>
</tr>
<tr>
<td>Payroll</td>
<td>Antoinette Roberts</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:aroberts@fullerton.edu">aroberts@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-2066</td>
</tr>
<tr>
<td>Position Management</td>
<td>Seng Rojas</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:serojas@fullerton.edu">serojas@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-4677</td>
</tr>
<tr>
<td>Risk Management</td>
<td>Michael Coughlin</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:mcoughlin@fullerton.edu">mcoughlin@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-8673</td>
</tr>
<tr>
<td></td>
<td>International Travel</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:foreigntravel@fullerton.edu">foreigntravel@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-7346</td>
</tr>
<tr>
<td>Talent Acquisition</td>
<td>Tammy Dietzel</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:tdietzel@fullerton.edu">tdietzel@fullerton.edu</a></td>
</tr>
<tr>
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<td>(657) 278-6731</td>
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## Student Affairs Contacts

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<tr>
<th>College/Department</th>
<th>Contact Information</th>
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<tbody>
<tr>
<td>Associated Students, Inc.</td>
<td>Susan Collins</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:suscollins@fullerton.edu">suscollins@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-7456</td>
</tr>
<tr>
<td>Athletics</td>
<td>Sara Perry</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:saraperry@fullerton.edu">saraperry@fullerton.edu</a></td>
</tr>
<tr>
<td></td>
<td>(657) 278-2129</td>
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<tr>
<td>Student Affairs Resource, Budget, &amp; Planning</td>
<td>Rob Scialdone</td>
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<td><a href="mailto:rscialdone@fullerton.edu">rscialdone@fullerton.edu</a></td>
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<td>(657) 278-2025</td>
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RESOURCES

https://financialservices.fullerton.edu/ira/

Instructionally Related Activities

Effective July 1, 2023, the fiscal administration portion of the Instructionally Related Activities (IRA) program transitioned from Associated Students, Inc. (ASI) to the Division of Administration and Finance (AF).

All IRA-funded activities and transactions MUST adhere to state policies and procedures.
Questions & Answers?