Working From Home Procurement Questions

The San José State University Procure To Pay Team realizes that procurement has been especially difficult given the county's Shelter In Place orders and we want to provide some guidance on how to purchase items for SJSU employees to work from home. This advice may be updated in order for us to adapt to government regulations and requirements.

Tracking COVID Expenses

Why do we need to track spending related to COVID?

San Jose State University may receive emergency relief funding to off-set expenses incurred in response to COVID-19. It is important that we identify all related expenses. When and if the university receives reimbursement, we will work with the campus leadership to determine next steps.

How should we track COVID expenses?

Please code all costs associated with the COVID-19 response with class code 4716.

What funds can be used with class code 4716?

Please contact your college or divisional budget office for guidance. All costs associated with the response to COVID-19 should be coded with the class code 4716 regardless of funding source.

If our office purchased laptops for staff to use at home, should this be classed as a COVID-19 expense?

If the laptops were purchased because of the shelter-in-place ordinance, then they should be classified as COVID-19 purchases. If the department was already planning to purchase laptops for staff members, then they should not be classified as COVID-19 purchases.

Home Deliveries

Can I ship office supplies to a home address?

While we are sheltering-in-place, you can ship certain items to a home address if you have written approval from the appropriate approving official. See the **Office Supplies and Equipment** section below for more details.

Why can't I ship to a home address when I'm using CSUBuy?

The CSUBuy application is managed by the Chancellor's Office and does not allow users to enter a home address for delivery. Any purchase made through CSUBuy must be shipped to the campus. Employees can pick up the item at Distribution Services between 8:00am to 12:00pm and 1:00pm to 4:00pm. Please call 408-924-1590 to schedule a pickup time.

Can I buy directly from a supplier's website so that I can ship office supplies to a home address?

Yes, certain supplies of lower dollar threshold such as pens, paper, and sticky notes can be shipped to a home address if you purchase them directly from a supplier's website. If you plan to ship small-dollar items to an employee's home address, please utilize the Staples Employee Discount Program, or communicate with Karen McCall who will find you a vendor to process your order as a requisition.

Campus Deliveries

Can employees pick up items from the university mailroom?

Yes, as long as it's addressed to *129 South 10th Street* or *One Washington Square* then it will be delivered to the campus and an employee can pick it up at Distribution Services between 8:00am to 12:00pm and 1:00pm to 4:00pm. Please call 408-924-1590 to schedule a pickup time.

I have some invoices to receive in CFS but I have no way of verifying if the item arrived on campus. What should I do?

Follow the instructions below from Distribution Services about picking up packages so you could verify that they have arrived and then approve the invoices for payment.

Mail and/or packages can be picked up during our normal operating hours – 8:00am to 12:00pm and 1:00pm to 4:00pm Please email the contacts below and provide the department name and extended zip code to be picked up, as well as the pickup date and approximate time.

- For USPS mail, please email sonja.bowsky@sjsu.edu and joel.crowley@sjsu.edu.
- For packages in Distribution Services, please email sonja.bowsky@sjsu.edu and john.munn@sjsu.edu.
    - Include the tracking numbers, if available.
    - Please note that if your department is expecting a temperature-controlled or time-sensitive shipment, email the tracking number and addressee information to sonja.bowsky@sjsu.edu, phil.perez@sjsu.edu, and john.munn@sjsu.edu.

○ You will be contacted when the shipment arrives to make pick up arrangements.

Office Supplies and Equipment

Per the SJSU Temporary Telecommuting Agreement, employees have been notified that they are responsible for the configuration of and all of the expenses associated with their telecommuting workspace and all services unless the Department expressly agrees otherwise.

Can I ship office supplies to an employee's home?

Yes, but the Procure2Pay method will be determined by the type of product being purchased:

1. Low-dollar office supplies, such as ink, paper, pens, and notebooks may be shipped to an employee's home as long as there is written approval from an approving official. These office supplies should be purchased directly from the Staples website (our Preferred Office Supplies Vendor) using a ProCard. Please register your ProCard with the Staples Employee Discount Program to ensure you are getting the best pricing available for the CSU.

   Please note that CSUBuy purchases can only ship to the campus.

2. "Special" office supplies, such as microphones, headsets, and webcams, can be purchased with a ProCard, but they require your Dean or AVP's written approval. Departments are expected to keep track of these office supplies by having their employee submit a Property Check Out Form.

Please be aware that **all purchased items are the property of SJSU and will need to be returned to campus** once the staff is no longer working from home.

How can I purchase office equipment for a home office?

All laptops, tablets, monitors, printers, chairs, and desks that are purchased for home offices will require a requisition, and written approval from your Dean. These items will be designated as SJSU property and will need to be cataloged by the department and returned once the shelter in place is no longer in effect.

The procurement method for any other equipment will be determined by the value of the equipment:

● Equipment that is less than $5,000, can be purchased using ProCard or a Requisition.
● Equipment that is $5,000 or greater must be purchased using a Requisition.

Dean/AVP approval is required for all equipment that is going to be used in a home office,

regardless of whether it is delivered to campus and then picked up or it is delivered directly to an employee's home address.

Departments are expected to keep track of equipment by having their employee submit a Property Check Out Form and submitting them to your approving official. (Please be aware that unused supplies will need to be returned to campus once staff is no longer working from home.)

Are there other situations that require a requisition?

If you want to purchase an item from CSUBuy and have it shipped to your home address, you will need to submit a requisition so that Contracts and Procurement Services can order the supplies for you and designate a home address for shipping. CSUBuy does not have the ability to ship to anything other than the campus.

What backup documentation do I need to include in the requisition?

If you are buying office equipment (desks, laptops, monitors, printers, etc) then you need to attach your Dean or AVP's approval to the requisition. You should also include any price quotes that you may have found for the equipment.

What backup documentation do I need to include with my ProCard statement?

Please continue to provide copies of all receipts for all posted transactions. If you had office supplies that are not small dollar value shipped to a home address, please provide written approval from your Dean/AVP that explicitly approves each home delivery.

Who should be tracking equipment that goes from work to a home office?

Your department is responsible for tracking equipment checked out by employees. Distribution and Asset Management has provided a Telecommuter Equipment Tracking spreadsheet for your reference. Please follow these instructions to save a copy to your Google Drive.

Internet and Cellular Expenses

Per the SJSU Temporary Telecommuting Agreement, employees have been notified that they are responsible for the configuration of and all of the expenses associated with their telecommuting workspace and all services unless the Department and Division expressly agree otherwise.

Is there any assistance available for faculty that have no personal internet and have had to get it in order to provide online sessions?

Contact the IT Service Desk. They are trying to provide solutions and may be able to connect

faculty with no-cost services.

Working from home sometimes requires us to use our personal phones or devices. Can we be reimbursed for these expenses?

In very rare situations, a Division Vice President may deem it appropriate to reimburse for personal telephone use. However, we expect that most employees can conduct a majority of their work using the internet and free online applications (Gmail, Google Hangouts, Zoom, DocuSign, etc) provided by the university.

Please note: Hangouts through your Gmail has a phone option that allows you to "call" people in your contact list at no additional cost.

Can SJSU purchase Xfinity internet through a requisition for individual faculty?

Please reach out to the IT Service Desk first as they offer Xfinity HotSpot for individuals that need it.

Travel

What's the status of university business travel?

The CSU Chancellor's Office has informed us that non-essential international and domestic travel will be suspended through June 30, 2021. You can refer to the FinanceConnect blog for updates to our travel policies while the shelter-in-place ordinance is in effect: https://blogs.sjsu.edu/financeconnect/category/travel/

How do I get approval for essential travel?

All essential travel must be approved by the President. We have provided instructions on the new adapted travel process for Presidential Approval for domestic travel.

What type of travel has to go through the Adapted Travel Form?

The new adapted travel process for Presidential Approval was created for all essential domestic travel because the FTS authorization process for this type of travel does not route to the President's Office. We created specific forms for each division to submit their request for Presidential approval. Please see FinanceConnect Blog for more information.

Should I submit moving expenses on the Adapted Travel Form?

No, moving expenses should not be submitted on the Adapted Travel Form.

How do I get approval for essential international and domestic travel?

All essential travel must be approved by the President. We have provided instructions on the [new adapted travel process for Presidential Approval](#) for domestic travel. International travel will continue to route to the President's Office for approval in FTS.

Do I need to submit a travel authorization for virtual meetings/conferences?

Yes, we are treating virtual events as if they took place in person. For faculty, their university class schedules must be covered in order for them to participate in the virtual event. Also, due to the uncertainty of how long we will remain sheltering in place, there is a possibility that conferences may switch to in person at any point in time.

Will mileage be reimbursed to staff that have to travel to work from home to get supplies or files?

No, staff and faculty do not get reimbursed for mileage to and from work. Per IRS rules, traveling to and from work is not a legitimate business expense, so we cannot pay for it.

Virtual Travel and Software

Can I attend a virtual conference?

Yes, it is submitted similarly to Travel. Please submit a Travel Authorization. For more information, see [Virtual Meetings / Conference FAQ's](#).

What account number should I use for a Virtual Travel conference?

660009 - Training & Professional Development.

Can I do a virtual conference in a restricted state?

Yes, as long as it remains virtual.

How can I pay for this virtual conference?

You can pay with a GoCard or Travel Reimbursement claim (which is submitted first as a Travel Authorization and then turns into a Travel Reimbursement after approval).

Can I attend a business-related virtual event?

Yes, but there are different processes based on the type of event:

- Professional development/training: You must submit a Travel Authorization.
- Recruiting event: It can be paid for with a GoCard, however, if it shifts to an in-person event, then you will be required to submit through a Requisition.

Do I need a TRIA for a Virtual Travel Conference?

TRIA is <u>required</u> for:

- SkillPath Webinars, if the department is purchasing the online training and materials.
- Access to unlimited training offered for free.

TRIA is <u>not required</u> if:

- The individual is signing up for an online training provided by a 3rd-party, for instance, a conference hosted by CSU.
- The online meeting is conducted within Zoom, an application that has been reviewed by SJSU IT.

Can I purchase an online subscription? How do I pay for it?

Yes, as long as it is for online periodicals and information only, for single-user view. The subscription cannot be for a broad audience, e.g. students or multiple end-users.

- Single-user requests can be paid for with a ProCard, a Direct Payment, or Employee Reimbursement.
- Multiple end-user requests must go through a [Requisition and TRIA](#).
- Any software related subscriptions and services must go through a [Requisition and TRIA](#).

Can I "renew" a license for an online subscription? How do I pay for it?

Yes, if for an online periodical or single-user view information only (can be paid as mentioned in the previous question), however, everything else, please submit a [Requisition and TRIA](#).

Can I pay for an online platform to use for my work and get reimbursed?

No. *Example: I want to pay for Trello which is an online platform that helps me get organized. Any platform being utilized on a campus computer by an employee or student must go through the TRIA process to ensure all aspects of the software program are being reviewed which*

include VPATs, ATI, security, etc, this is the reason that pre-approval with the TRIA is necessary.

What if I paid for an online platform to use for my work already and I want to get reimbursed for it?

It is recommended that you request a refund, then submit a requisition and TRIA form. Procurement will process the payment with a department ProCard. *Note: There are laws and security risks that IT and Procurement teams are trying to decrease which is the sole reason this process was put into place.*

I'm too busy for this TRIA process. Can I get an exception?

The TRIA process is required. If there is no alternative and you still require an exception, please see the link exception.

Where can I get more information about Accessibility and TRIA?

See web links below:

- Accessibility Laws
- SJSU @ Accessibility
- TRIA
- Web accessibility

I'm not disabled. Is this TRIA process optional?

No. State and federal laws require SJSU to purchase products and services that are accessible to everyone, including the disabled. The TRIA Procurement Process is applicable to all campus departments, regardless of disability.