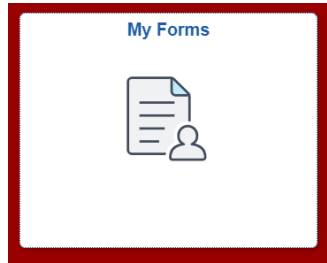
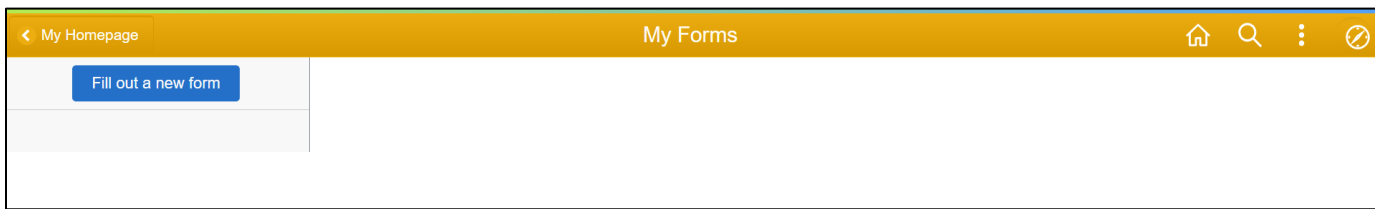


**TITLE: My Forms in Cardinal Financials – Gift Awards**

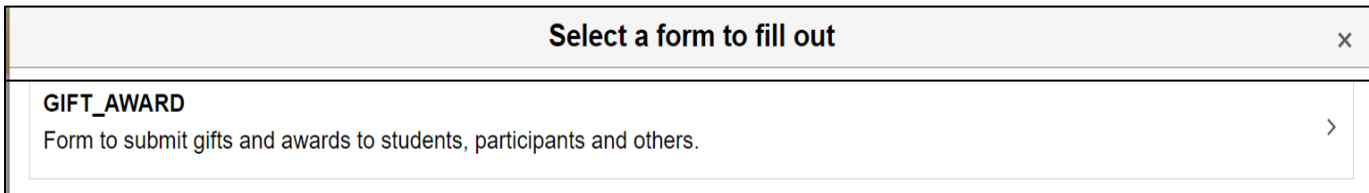
1. From the Cardinal Financials Homepage, click on the tile button “My Forms”.



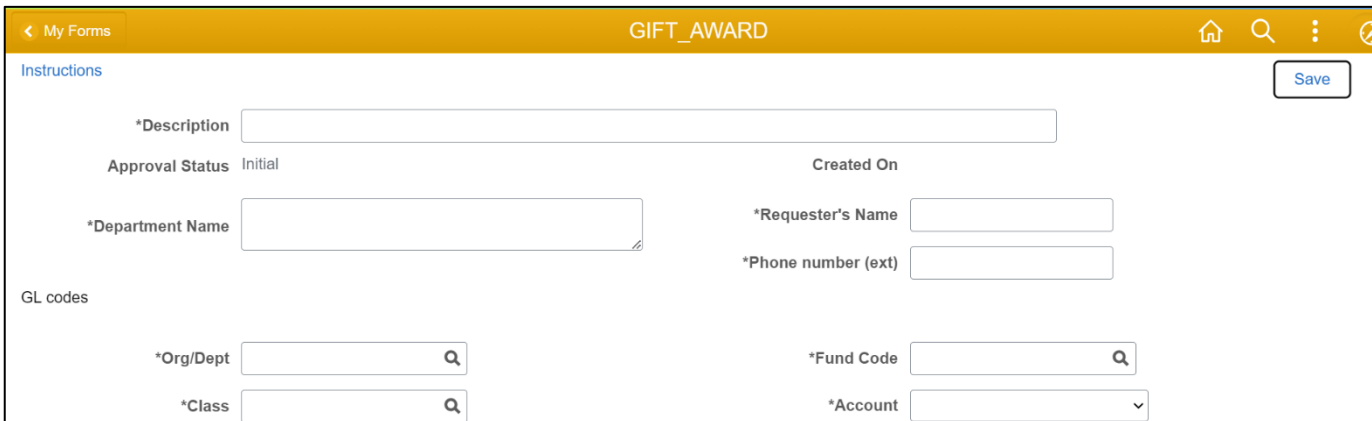
2. In “My Forms” click on “Fill out a new form” in the upper left corner.



3. From the list “Select a form to fill out” select “GIFT\_AWARD” to fill out.

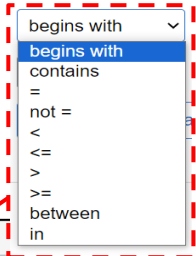


4. Fill in all the required fields identified with an asterisk “\*”. You will not be able submit your form if a required field is not entered.
  - a. “Description” should be brief, explaining the purpose of the gift award.
  - b. “Department Name” name of your school or department.
  - c. “Requestor’s Name” can be someone other than the person making the entries on the form.
  - d. “Phone number (ext)” is the Requestor’s CUA extension number.



5. GL Codes are searchable by clicking on the magnifying glass icon to the right of the entry field.

- a. In the pop up “**Lookup**” utility page, click on “**Search Criteria**” to show your search options.
- b. Click on “**Show Operators**” to better enhance your search options beyond “begins with”.



6. GL Codes

- a. “**Org Dept.**” identification number, often referred to as the “*Dept ID#*”. It is only searchable by Department number or the Manager Name and not by the Department Name (Description).

GL codes

\*Org/Dept

\*Fund Code

\*Class

\*Account

- b. “**Class**” usually “INSPT” (Institutional Support) or “INDR” (Instruction / Departmental Research) unless otherwise advised by your department or school. It is only searchable by “Class Field” and not by “Description”.

Class Field ◇	Description ◇	Budgetary Only ◇
INDR	Instructn/Departmental Research	N
INEQP	Contractor Installed Equipment	N
ININT	Internal Interest	N
INSPT	INSTITUTIONAL SUPPT	N
INSTR	INSTRUCTION	N
INVST	Investment Income	N
KEYNG	Keying	N

- c. **“Program”** is usually “GEN” (General). Note: it is only searchable by “Program Code” and not by “Description”.

Program Code ◇	Description ◇	Budgetary Only ◇
GAS	Gasoline	N
GEN	General	N

- d. **“Fund code”** is most often “11” (Budgeted and General). Contact your supervisor for the correct Fund Code to use. Note: it is only searchable by “Fund Code” and not by Description.

Fund Code ◇	Description ◇	Budgetary Only ◇
11	Budgeted and General	N
12	General Fund Enterprise	N
13	Realized Endowment Gain	N
14	Unrealized Endowment Gains	N
15	Auxiliary Operations	N
16	Capital Campaign	N
17	Unrest Investment Pool	N

- e. **“Account”** has a drop down menu to make your choice.

- i. **Prizes/Awards (Cash)** - Transactions to be issued in the form of cash such as gift cards or ACH/check Accounts Payable; transactions should be recorded to G/L account 1604 - Cash Awards.

The screenshot shows a form with the following fields:

- \*Org/Dept: [Search]
- \*Class: [Search]
- \*Program: [Search]
- \*Fund Code: [Search]
- \*Account: [Dropdown Menu]
- Project: [Search]

The dropdown menu for \*Account is open, showing the following options:

- Prizes/Awards (Cash)
- Study Subjects (Grants only)
- Sponsorship/Contributions
- Prizes/Awards (Non-Cash)

A red dashed box highlights the dropdown menu, and a red arrow points to the 'Prizes/Awards (Cash)' option.

- ii. **Study Subjects (Grants Only)** - Payments to research participants on grants only as approved by the Institutional Research Board (IRB); requires a "Project" code entry of the grant. By default, transactions will be recorded to GL account 1605 - Participants where indirect cost is not allowed. In instances where indirect cost is allowed, a cost transfer to GL account 1604 - Payments to Subjects will be required.
- iii. **Sponsorship/Contributions** - Donations or charitable payments to external parties; transactions will be recorded in G/L account 6500 - Charitable Contributions.

- iv. **Prizes/Awards (Non-Cash)** - Tangible items to provide a gift, award, or prize such as a trophy, television, watch, book, tickets, etc.; transactions will be recorded to G/L account 1621 - Non-Cash Awards.
- f. **“Project”** though not a required entry, is only needed when the funds will be coming from a grant. This is required if the **“Account”** chosen is **Study Subjects (Grants Only)**.

7. Gift/Award Details

The screenshot shows the 'Gift/Award Details' form. Three dropdown menus are highlighted with red dashed boxes:
 

- \*Intended Recipients:** Employee, Student, Study Participant, Non-Resident Alien, Others.
- \*Payment Method:** Pcard, Gift Card Funding, AP Voucher Payment.
- \*Gift Type:** Physical Cards, Digital Cards, Others/Gifts.

 Other form fields include:
 

- \*Anticipated Distribution Date (with a calendar icon).
- Denomination 1, Denomination 2, and \*Total Value input fields.
- Quantity 1 and Quantity 2 input fields.
- A disclaimer at the bottom: Disclaimer: Gifts to and from foreign officers, as well as any involvement in political activities, are strictly prohibited.

- a. **“Intended Recipients”** has a drop down menu for your choice.
  - i. **Employee** – Staff or faculty of CUA
  - ii. **Student** – graduate or undergrad of CUA
  - iii. **Study Participant** – individual internal or external to CUA who is participating or the subject of a research study
  - iv. **Non Resident Alien** – individuals who are non-US citizens
  - v. **Others** – will require additional detail entered in the **“More Information”** field at the bottom of the page.
- b. **“Anticipated Date”** is the date the awards are to be distributed or start to be distributed. A search calendar is available by clicking on the calendar icon to the right in the entry field.
- c. **“Payment Method”** the means to provide funds from your GL account codes for the gift award. PLEASE NOTE: All selections for payment and gift type must comply with the Gift Card [Policy](#).
  - i. **PCard** – Requestor must be a CUA PCard holder
  - ii. **Gift Card Funding** – available funding from Gift-o-gram
  - iii. **AP Voucher Payment** – voucher generated by AP
- d. **“Gift Type”** has a drop down menu for your choice to include the options
  - i. **Physical Cards** – you will be notified when to pick up your cards at Leahy Hall.

- ii. **Digital Cards** – available on Gift – o – Gram.
  - iii. **Other/Gifts** – additional details are required.
- e. **“Please provide details if chosen Gift Type is “Others/Gifts”** – text field for additional details.
8. NOTE: Denominations are needed for gift cards ONLY. Include at least one (1) gift card denomination (denomination should be at minimum five (\$5)). If more than two (2) denominations are needed, then enter the additional and their quantities as a comment in the **“More Information”** field towards the bottom of the page.

Include gift card denominations (\$10, \$25, \$50, \$100, etc). Add comments if you need more than 2 different denominations.

Denomination 1	<input type="text"/>	Quantity 1	<input type="text"/>
Denomination 2	<input type="text"/>	Quantity 2	<input type="text"/>
*Total Value	<input type="text"/>		

Disclaimer: Gifts to and from foreign officers, as well as any involvement in political activities, are strictly prohibited.

- a. **“Denomination 1”** is not a required field, but is needed when intending to distribute gift cards.
  - b. **“Quantity 1”** is the number of gift cards for the amount entered in “Denomination 1”.
  - c. **“Total Value”** is a required field for the total dollar amount of ALL gift cards times their denomination OR the total amount of gift that is NOT gift cards. This field does not calculate your entries. You will need to do the math, correctly, and enter the number.
9. Verification, certification, and submission

<p>I verified that there are enough funds available in this org for these gifts or awards. <input type="radio"/> No</p>	<p>I will submit a complete gift card log to the cua-tax@cua.edu within next 60 days. <input type="radio"/> No</p>
<p>I certify that these gift and awards are being purchased in compliance with the Gift Card Policy. <input type="radio"/> No</p>	
<p>More Information <input type="text"/></p>	
<p><b>Attachments</b></p> <p>There is no attachment uploaded.</p> <p><input type="button" value="Add Attachment"/></p>	

- a. Verify there are enough funds in the above entered account codes for the total value of these gifts or awards by clicking on the yes / no toggle button.
- b. Certify that these gifts and awards are being purchased in compliance with the CUA Gift Card Policy found [here](#) by clicking on the yes / no toggle button.

- c. Submission acknowledgment of future Gift Card [Log](#) within sixty (60) days of distribution by clicking on the yes / no toggle button.
- d. **“More Information”** provides a place for additional information and comments related to additional needed denominations and quantities of gift cards. It is not required.
- e. **“Add Attachment”** for any supporting documentation, advertisements, flyers, etc. that would aid in the review and approval of your request.
  - i. NOTE: Before you click the **“Add Attachment”** button, save your request by scrolling to the top and clicking on the **“Save”** button in the upper right of the page.

10. When all required entries are made, click the **“Save”** button at the top of the page then click the **“Submit”** button and your request form will begin the approval process.

11. To preview the approval sequence click on the **“Preview Approval”** button.

12. Return to your My Forms homepage by clicking on **“My Forms”** at the top left of the page.

13. All submitted forms will be listed on “My Forms” that includes the current “Approval Status” of the Form.

The screenshot shows a web interface titled "My Forms". On the left, there is a sidebar with a "Fill out a new form" button and a "\*View By" dropdown menu set to "Status". Below this, a filter bar shows "All" with a count of "1". The main area displays a table of forms:

Form	Description	Approval Status	Created Datetime	Submitted Datetime
GIFT_AWARD	Roadshow gifts and prizes	Pending	01/11/24 8:58AM	01/11/2024 9:00AM

14. What happens next after your GIFT AWARD is “Approved”? IF using -

- a. PCard: Make the purchase as described in the form. Upload a digital copy of the approved form and/or reference the approval in the business purpose of the reconciliation.
- b. Gift Card Funding:
  - i. Physical Gift Cards: An email notification will be sent when to pick them up at Leahy Hall.
  - ii. Digital Gift Cards: An invitation will be sent to register with Giftogram. Follow the registration instructions provided. An additional invitation will be sent to sign up for a brief training on how to use Giftogram. Contact [AskProcurement@cua.edu](mailto:AskProcurement@cua.edu) if there are not received.
- c. AP Voucher: In Cardinal Financials enter a Payment Request. Reference the approved form in the notes field.