



Stony Brook **Foundation**



AvidInvoice Guide for Submitters and Approvers

September 2025

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AVIDINVOICE WORKFLOW ROLES

Submitter: This is the person in each department who is responsible for the accurate submission of accounts payable transactions in the AvidInvoice system. When they have completed the submitter's steps as outlined in this guide, they will approve the submissions forward to the signatory/cost approver for the department.

Signatory: This is the person in each department who is responsible for approving AvidInvoice submissions, confirming that they align with donor intent, account purpose and the Stony Brook Foundation's policies. They will approve the submissions forward to the Foundation's Accounts Payable Department for review, processing, and payment.

SBF Accounts Payable: This is the team who is responsible for final review of each Avid submission, checking for accuracy and policy alignment. They will approve the submissions forward for payment.

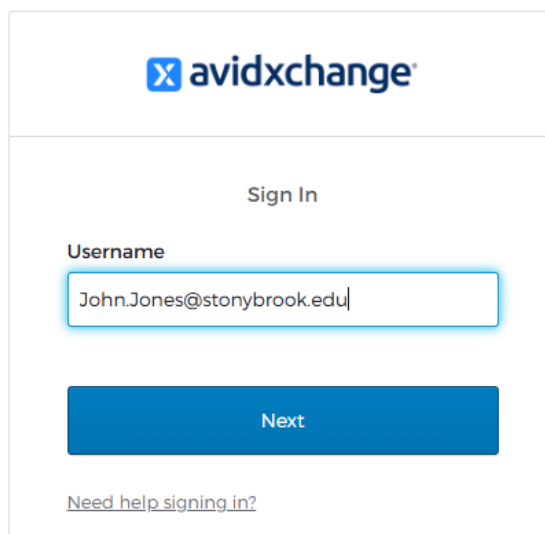
ACCESSING YOUR AVIDINVOICE PORTAL

Users will receive an email from the system inviting them to create a new password.

Multifactor Authentication will be in effect.

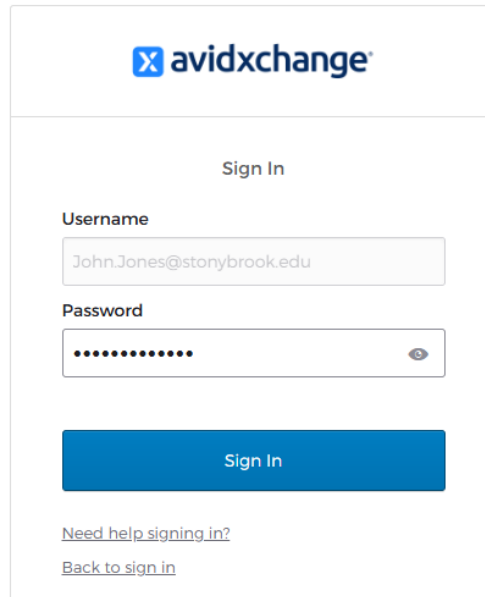
Your username is your stonybrook.edu organizational email address.

Navigate to **login.avidsuite.com**



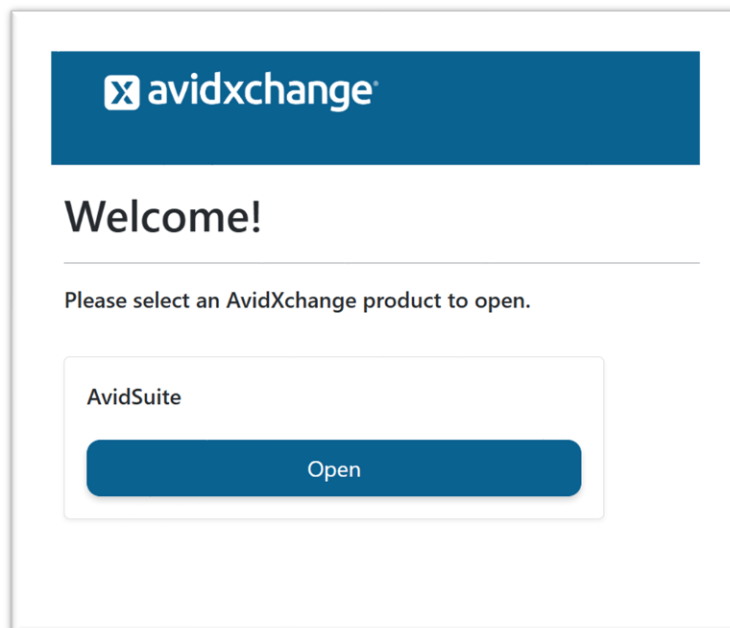
The screenshot shows the AvidExchange login interface. At the top is the AvidExchange logo. Below it is the text "Sign In". Underneath is a "Username" label followed by a text input field containing "John.Jones@stonybrook.edu". Below the input field is a blue "Next" button. At the bottom, there is a link that says "Need help signing in?".

Click next. Enter your password and click **Sign In**. If you have forgotten your password, you can choose **Need help signing in** option to request a password reset.



The image shows a web form for signing in to AvidXchange. At the top is the AvidXchange logo. Below it is the text "Sign In". There are two input fields: "Username" with the text "John.Jones@stonybrook.edu" and "Password" with masked characters. Below the password field is a blue "Sign In" button. At the bottom are two links: "Need help signing in?" and "Back to sign in".

Choose the Open button to complete the login.

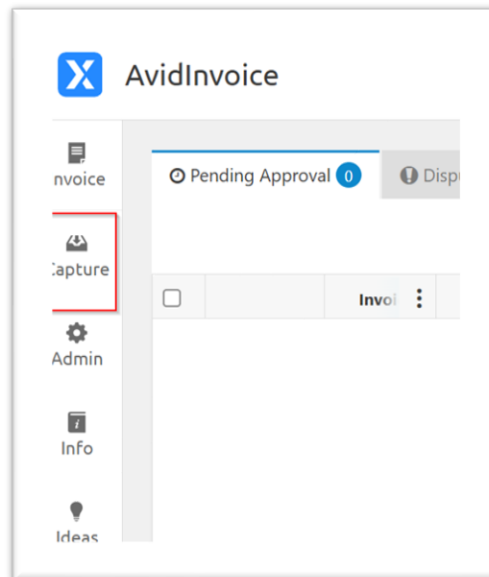


The image shows a welcome screen for AvidXchange. At the top is the AvidXchange logo. Below it is the text "Welcome!". There is a horizontal line. Below the line is the text "Please select an AvidXchange product to open.". There is a box containing the text "AvidSuite" and a blue "Open" button.

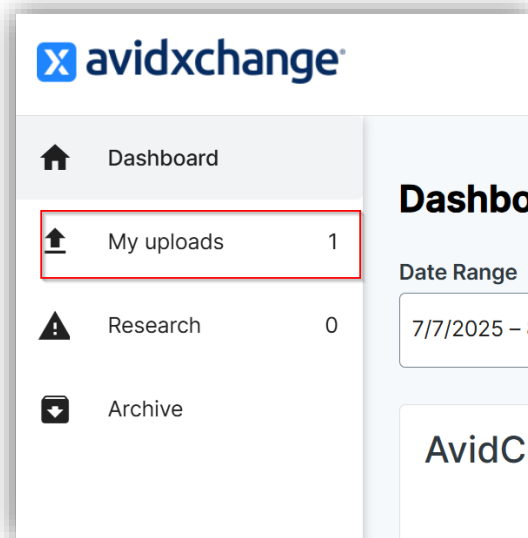
You will be brought to your **Invoices Pending Approval** queue. Please see further below in this document for how to approve invoices.

SUBMITTING INVOICES IN AVID CAPTURE

Avid Capture will be used for submitting invoices. Avid Capture is accessed by selecting the Capture icon from the left side navigation pane.




Avid Capture will open in a new browser tab. From the left side navigation pane here, select **My Uploads**.



Click “select files” to upload the invoice. Select the PDF file that contains the invoice you are submitting. (Only PDF files are permitted to be uploaded in Avid capture). Use the refresh icon to see that the upload has completed.

My uploads

Auto scan ⓘ
On ☒



Select files or drop here
Supported file types: .PDF
Max files allowed: 50, Max size per file: 10MB

Files are available in My uploads after processing is complete. Larger files can take a few minutes to process.

Search

☒

<input type="checkbox"/>	File name	Upload date	↑	Upload status
<input type="checkbox"/>	Invoice09042020.pdf	06/09/25 02:44PM		Completed

Once the Upload Status says “Completed” you may click into the file name (Invoice09042020.pdf in example above). The PDF of the invoice will be displayed in the middle of the window. The required fields for data entry will be displayed on the right.

Stony Brook Foundation (Invoice09042020.pdf)

Delivered by user upload (stonybrookfoundationIPM@avidsupport.com) on 09 Jun 2025 2:44PM EDT [Activity log](#)

Save

More actions

Mark as



Submit



← Previous document




Current queue

Next document →

Page 1 of 1







INVOICE

From:

ANGEL MARTINEZ PAINTING, INC

1325 NW 32 ND AVE

MIAMI, FL 33125

Invoice Type

Standard

Supplier

ANDRAS VASY (SBFND) (0000039049)

1275 LAUREL ST

MENLO PARK, CA 94025

Customer Account Number

none

Ship To

Employer Benefits (116700)

230 Administration Bldg 330 (SBFND)

Stony Brook, NY 11794

Alias: 116700

POPULATING THE INVOICE DATA FIELDS

Avid Capture has functionality called “Click to Type”

This allows the user to select text on the PDF and drop it into the appropriate data field on the right-hand side of the window. Simply click on the text you would like to transfer to a field – it will highlight within a box - and then click in the appropriate field. The data will be transferred. You may use this for **Invoice Number, Invoice Date, Invoice Amount and Work Order Number (RF or IFR number)**.

The screenshot shows the Avid Capture interface. The top bar includes the document name 'Stony Brook Foundation (Stony Brook University.pdf)', delivery information, and buttons for 'Save', 'More actions', 'Mark as', and 'Submit'. The main area displays a PDF with several text elements highlighted in colored boxes: 'Stony Brook University' (blue), 'Wang Center Rental' (yellow), 'IFR: 900584-1' (red), 'Invoice #: 845127W' (blue), 'Date of Service: 8/11/2025' (green), 'Room Rental for SBF Staff Meeting Invoice' (yellow), and 'Total: \$250' (blue). The right-hand sidebar contains a form with the following fields: 'Invoice Type' (Standard), 'Supplier' (STONY BROOK UNIVERSITY (SBFND) (0000029495) P O BOX 619 STONY BROOK, NY 11790), 'Customer Account Number' (none), 'Ship To' (121000-BUSINESS OFFICE (121000) 230 Administration Bldg 330 (SBFND) Stony Brook, NY 11794 Alias: 121000), 'Invoice Number' (845127W), 'Invoice Date' (08/11/2025), 'Invoice Amount' (\$250.00), 'Due Date' (08/11/2025), 'Purchase Order Number' (blank), and 'Work Order Number' (IFR: 900584-1).

MANDATORY FIELDS TO POPULATE IN CAPTURE SCREEN

Customer Account Number: while it is **not required for SBF** to have a customer account number, it is a **required field in AvidInvoice** and should populate with “**none**”

Ship To: This is the **Department name and number** and includes the SBF address. You can search by name or numeric code.

Please be aware that this is a global field and submitters have access to ALL departments across campus. It is imperative that you choose the correct department name & number, otherwise this expense may be paid through an incorrect department.

Supplier: start typing supplier’s name. It should populate.

Invoice Number: ***This field cannot be left blank.*** If there is no invoice number attached to your submission, you must use the following format to create an invoice number:

Supplier Number **Amount** **Date of Invoice** (no spaces in between)

For example: For the above screenshot, the invoice number would be: **000002949525081125**

Another example:

Supplier Number: 00000268945

Amount: \$1,003.50

Date of Invoice: September 7, 2025

Invoice Number to populate: 000002689451003509725

Invoice Date: this will also automatically populate the **Due Date** field with the same date.

Invoice Amount

Ordered By: this is your name and email address. This field **must be** populated, or your submission will be flagged as “unmanaged”, and you **will not see it in your approval queue to keep working on and ultimately approve forward to the signatory.**

Workflow: The only choice is **Standard Invoice Approval**, and this field **MUST BE** populated. If left blank, there will be no assigned signatory and invoice **will not move through the workflow properly.**

Work Order Number: This field **MUST BE** used for payments to Research Foundation (RF) or to a State IFR account. This is where you enter the RF account # or the IFR #. Please preface the number with RF or IFR.

FIELDS NOT REQUIRED

Service Start Date, Service End Date, Previous Unpaid Balance and Memo are not required fields but feel free to include for your own recordkeeping purposes.

Purchase Order Number: This field is **NOT** to be utilized. Purchase order invoices **ARE NOT** paid through AvidInvoice.

The screenshot shows the Avidxchange web interface for creating an invoice. The header includes the Avidxchange logo, a user profile for Andria Adler, and navigation links for Dashboard, My uploads, Research, and Archive. The main content area is titled 'Stony Brook Foundation (SampleInvoice.pdf)' and shows a document viewer with a table of items. The right sidebar contains various fields for invoice details, including Customer Account Number, Ship To address, Invoice Number, Invoice Date, Invoice Amount, Due Date, Purchase Order Number, Work Order Number, Service Start Date, Service End Date, Previous Unpaid Balance, Ordered By, Workflow, and Memo. The 'Ordered By' field is highlighted with a red box, and the 'Workflow' dropdown is also highlighted with a red box.

From:
Advanced Office Systems
678 Sherwood Park South
Arlington Heights, IL 60004

Invoice Number:
Invoice Date:
Terms: Net 30
PONumber:

Bill to:
Fabrikam, Inc.
P.O. Box 1620
Plymouth, MA 02360

Attention: John Connelly

Item	Description	Quantity	Unit Cost	Extended Cost

Customer Account Number
none

Ship To
221130-NY ISLANDERS CHILDREN'S-BURN
(221130)
230 Administration Bldg 330 (SBFND)
Stony Brook, NY 11794
Alias: 221130

Invoice Number
TEST456

Invoice Date
08/01/2025

Invoice Amount
\$100.00

Due Date
08/01/2025

Purchase Order Number

Work Order Number

Service Start Date

Service End Date

Previous Unpaid Balance

Ordered By
Andria Adler

Workflow
Standard Invoice Approval

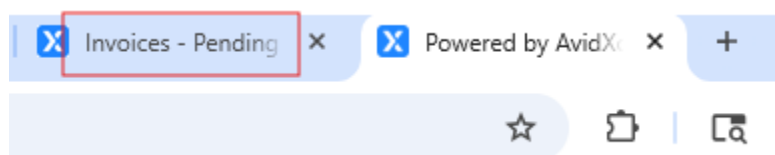
Memo

When the required fields have been completed, the **SUBMIT** button will be available at the upper right. Once the invoice has been submitted out of Avid Capture, it will be available in your **pending approval queue in the main portal**. It can take an invoice a moment or two to move from Avid Capture to your pending approval queue.

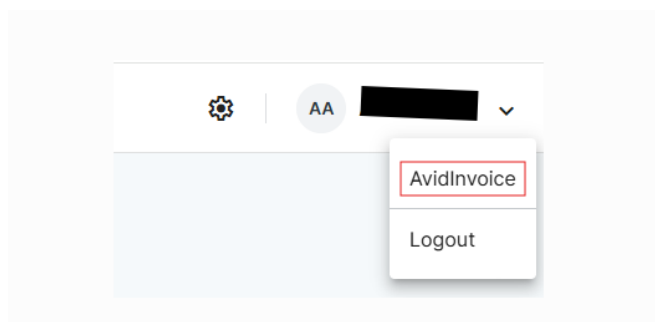
PENDING INVOICES QUEUE

Unlike the previous Ariett/AvidSuite system, submitters must go through a two-step process to submit transactions for payment. The first is Avid Capture, explained in the previous segment. The second is finishing the submission in the “Pending Approval” queue, which when completed and approved by the submitter will route to the department signatory.

To return to the main portal where you can view and work on this and other pending invoices, you can either go back to the previous tab in your browser as shown below labeled “Invoices -Pending”:



Or click the dropdown next to your name in the upper right corner and choose AvidInvoice



This takes you back to the main portal featured below:

AvidInvoice Hi Andria! | Stony Brook Foundation | In Testing

Invoice: Pending Approval 1, Disputed 0

Buttons: + Create Invoice, Export, Create Report

	Invoice #	Invoice Date	Due Date	Supplier	Supplier ID	Total	Department	Department ID	Action	Days	Order	Proxy	PO Number
<input type="checkbox"/>	TEST456	08/01/2025	08/01/2025	Supplier for Testing	TEST001	100.00	221130-NY ISLANDERS CHILDREN'S-BURN	221130	Standard Invoice Approval - Step 1	0	Andria Adler		

****If you do not see your submission in the Pending Approval Queue as shown above, you most likely did not fill in your name in the “Ordered By” field**

Click the search icon in the upper right corner and under “Status” choose “Pending Approval - Unmanaged” and click the Search icon on bottom left. This will bring up the missing submission.

ADVANCED SEARCH CRITERIA ☆

(Results limited to items created 7 year(s) prior to today's date. * Inactive or Invalid)

INVOICE # - Starts With -

SUPPLIER

DEPARTMENT

INVOICE DATE Any

BATCH STATUS - Select -

WORKFLOW

APPROVER - Select -

STATUS Pending Approval - Unmanaged

SUPPLIER ACCOUNT #

ORDERED BY - Select -

DUE DATE Any

PO #

ENTERPRISE CODE GROUP

SUPPLIER STATUS Active

PROPERTY STATUS - Select -

INVOICE TYPE - Select -

CREATED DATE Any

TOTAL TO

POSTING DATE TYPE - Select -

Click the invoice number to drill into the invoice you wish to work on:

INVOICE SEARCH RESULTS 3			
<input type="checkbox"/>		Invoice #	Department
<input type="checkbox"/>	<input type="checkbox"/>	56001	121502-ADVANCEMENT EVENTS
<input type="checkbox"/>	<input type="checkbox"/>	240104-78790	110000-AUDIT ADJUSTMENTS
<input type="checkbox"/>	<input type="checkbox"/>	586321	121502-ADVANCEMENT EVENTS

Once you drill into the invoice you will see the screen below. **Be sure to complete the “Ordered By” field in the header**

Header

INVOICE # none-081025

TOTAL 750.00

INVOICE DATE 08/10/2025

INVOICE POSTING DATE 08/10/2025

INVOICE DUE DATE 08/10/2025

SUPPLIER **A VISUAL APPROACH LLC (SBFND) (0000038769)**
106 W GEER ST
DURHAM, NC 27701
SBFND

CUSTOMER ACCOUNT # none

CONTRACT # View Contract

DEPARTMENT **122002-ANNUAL GIVING (122002)**
230 Administration Bldg 330 (SBFND)

A Visual Approach, LLC
106 W Geer Street
Durham, NC 27701

Invoice: 586321
Date of Service: 8/02/2025
Website development fees for University Advancement website.

Department Codes	Accounting Codes	1042 / Foreign Vendor	Wire Payment	Description	Percent	Amount
122002	(please edit)	N	N		100.00	750.00
122002-ANNUAL GIVING	Please Add GL Code	No	No			

MANDATORY HEADER FIELDS

Most of these fields should have populated through the Capture page; however, make sure the following fields in the Header are also completed:

INTERNAL MEMO/REMARKS FIELD: This is a **MANDATORY FIELD** (even though it is marked optional) This field is where the justification for the expense should go. This field will allow for 1000

INTERNAL MEMO / REMARKS Justification for expense should go here

ORDERED BY (ON BEHALF OF) Malamutt Accounts Payable User

WORK ORDER # IFR # if applicable

SEPARATE CHECK OFF

MARK FOR USE TAX OFF

Property Codes	Accounting Codes	1042 / Foreign Vendor	Wire Payment	Description
Employer Benefits	Software-SB Trustees Faculty Award- Cao	No	No	Distribution memo
116700	243590-803301	N	N	
Employer Benefits	Conference/Convention-Coastal	No	No	Distribution memo 2

characters. Should you need additional explanation and/or have back up documentation, those may be added in the attachments tab. If this is not comprehensive and does not explain the business justification, SBF will send it back to the submitter.

For examples of business justification language please see Appendix A

WORK ORDER # FIELD - this is a **MANDATORY FIELD** for payments to Research Foundation (RF) or to a State IFR account. This is where you enter the RF account # or the IFR #. Please preface the number with RF or IFR.

FIELDS NOT REQUIRED IN HEADER

Customer Account #, Contract #, Separate Check, Mark for Use Tax, Service Start Date, Service End Date, and Previous Unpaid Balance are not required fields but feel free to include for your own recordkeeping purposes.

Purchase Order Number: This field is **NOT** to be utilized. Purchase order invoices **ARE NOT** paid through AvidInvoice.

FIELDS AT THE BOTTOM OF THE INVOICE PAGE

1. Distributions Tab

Property Code (the department number) will populate automatically

You may add as many lines of distribution coding as are necessary

***Helpful hint:** Under accounting codes, start typing in the department number. You will then see all the accounting codes associated with the department in a dropdown. Choose the correct department and code for the expense.*

Please note that accounting codes can be searched by number or description.

MANDATORY FIELDS TO POPULATE IN THE DISTRIBUTIONS TAB

- **Department Code**
- **Accounting Codes**
- **Distribution Description**
- **Wire Payment** – defaults to No, should be changed to yes on the top line of distribution if the invoice will be paid by wire. If **YES**, you **must attach a banking verification form** with the bank information for the wire.
- **1042/Foreign Vendor** – defaults to No, should be changed to yes if the payee is a foreign vendor.

2. Line items Tab

The line items tab typically will not be utilized; the only time anything would need to be done there is if the invoice header amount is changed. The unit cost on the line items tab must always match the invoice header amount.

3. Attachments Tab

Use this area to attach additional necessary backup documents such as spreadsheets, correspondence, banking verification forms etc. Attachments are not limited in type to PDF, they may be Word, Excel, image files, etc. **WHEN POSSIBLE, PLEASE COMBINE MULTIPLE DOCUMENTS INTO ONE SINGLE FILE FOR EASIER REVIEW.**

4. Comments Tab

The comments tab may be used to log and store comments with the invoice and to email those comments to another user in the system.

INVOICE #3462626

VIEW: [Header](#) [Associated Invoices](#) [Save](#) [Submit](#) [Create Report](#) [More](#)

Header

INVOICE DATE: 01/12/2023

SUPPLIER: **FARIA LORIN (SBFND) (0000039051)**
1441 OVERING STREET, APT 2E
BRONX, NY 10461
SBFND

CUSTOMER ACCOUNT #: none

CONTRACT #: View Contract

PROPERTY: **Employer Benefits (116700)**
230 Administration Bldg 330 (SBFND)
Stony Brook, NY 11794
SBFND

INVOICE STATUS: **PENDING WORKFLOW ASSIGNMENT**

Swap Image

678 Sherwood Park South
Arlington Heights, IL 60004

Invoice Number:
Invoice Date:
Terms: Net 30
PONumber:
Bill to:
Fabrikam, Inc
P O Box 1620

Distributions: 2 | Line Items: 1 | Attachments: 0 | Comments: 0 | Workflow | History

Remaining Amount: 0.00

Property Codes	Accounting Codes	1042 / Foreign Vendor	Wire Payment	Description	Percent	Amount
<input type="checkbox"/> Employer Benefits	Software-SB Trustees Faculty Award- Cao	No	No	Distribution memo	50.00	50.00
<input checked="" type="checkbox"/> 116700 Employer Benefits	243590-803301 Conference/Convention-Coastal Ecology & Conservation	N No	N No	Distribution memo 2	50.00	50.00

Choose **Approve** in the upper right when data entry is completed and ready to forward to the department signatories (cost approvers).

The invoice will route to the signatories for the selected department.

SIGNATORY STEPS

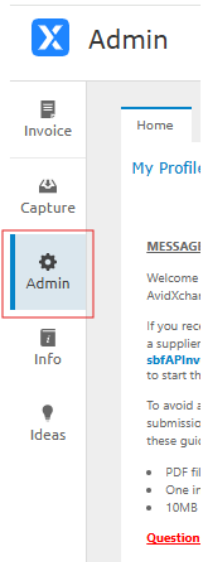
Important Note for Approvers: AvidInvoice does not allow dual roles; therefore, approvers can no longer submit transactions. In AvidInvoice, submitters and approvers have distinct roles with a segregation of these duties.

Signatories can sign into the AvidInvoice system as explained earlier in this guide.

Signatories need to subscribe for approval notifications in the AvidInvoice portal to receive an email from the system alerting them that there is a submission in their approval queue.

APPROVAL NOTIFICATION SUBSCRIPTIONS

Access your profile through the Admin Tab on the Left side of the screen:



Choose the frequency for which you want to receive notifications:
(i.e.) every day at 1:00; M-W-F 2:00 etc.

Approval Notification Subscriptions:

ID	Schedule
1	15:00 Eastern Standard Time Every day

Add Approval Notification Subscription:

I want to be notified at: 01 : 00

Frequency: Only on certain days of the week

☒ MO ☐ TU ☒ WE ☐ TH ☒ FR ☐ SA ☐ SU

APPROVING INVOICES

The signatories should now see the invoice in their invoices pending approval queue:

Pending Approval

24

Disputed

0

Create Invoice

VIEW USER'S QUEUE

Tasnim Mazum...

Approve

Export

Create Report

		Invoice	Invoice	Due	Supplier	Supplier	Total	Property	Prep	Action	Days	Order	Process	PO #
<input type="checkbox"/>	<div><div></div><div></div><div></div></div>	676575	05/19/2025	06/18/2025	EDEN ORSHAN (SBFND)	0000039046	123.67	Audit Adjustments	110000	110000-Audit Adjustments - Step 1	31	Barbara Mahoney		
<input type="checkbox"/>	<div><div></div><div></div><div></div></div>	553635	05/12/2025	05/12/2025	ANDRAS VASY (SBFND)	0000039049	150.00	Audit Adjustments	110000	110000-Audit Adjustments - Step 1	31			
<input type="checkbox"/>	<div><div></div><div></div><div></div></div>	345345	05/19/2025	06/18/2025	DENNIS J SELKOE (SBFND)	0000039010	300.00	Audit Adjustments	110000	110000-Audit Adjustments - Step 3	21	Barbara Mahoney		
<input type="checkbox"/>	<div><div></div><div></div><div></div></div>	456546	05/19/2025	06/18/2025	EDEN ORSHAN (SBFND)	0000039046	350.00	Audit Adjustments	110000	110000-Audit Adjustments - Step 3	31	David Smith		
<input type="checkbox"/>	<div><div></div><div></div><div></div></div>	3635	05/19/2025	06/18/2025	FATIMA EL-TAYEB (SBFND)	0000039040	123.00	Audit Adjustments	110000	110000-Audit Adjustments - Step 1	31	Barbara Mahoney		

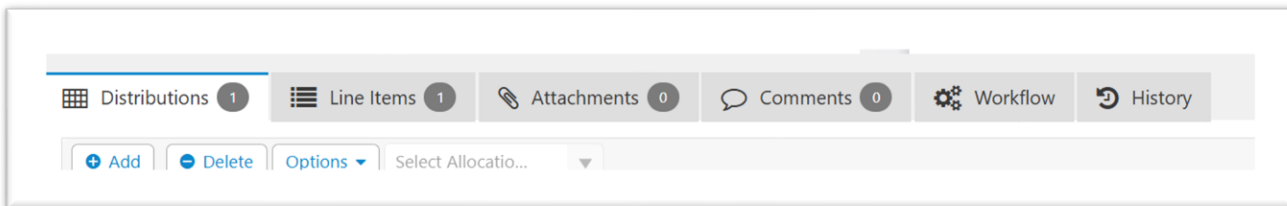
Click on the invoice number to drill into the invoice that you wish to review. Validate that all of the necessary information has been properly entered and into the appropriate fields. Validate that coding is complete and that the department numbers match between the header and the distribution coding.

HEADER ACTION BUTTON

VIEW
Header
Associated Invoices
Save
Approve
Skip
Create Report
More

- View Header: You may toggle the invoice header section in/out of view
- View Associated Invoices: You may toggle on/off another area of the window that will show you all other invoices from this vendor currently in the system
- Save: Saves changes made to the invoice
- Approve (see drop down for Approve with Comment): Approve the invoice forward to the next step
- Skip: Skip this invoice and go to the next one in your queue
- Create Report: Creates a PDF of details about the invoice, you can decide at the time of generation what details you wish to include
- More: Actions available under the more option may vary depending upon your user type:
 - Assign Ad-Hoc Approver – send the invoice to an approver not normally part of the workflow

- Assign Workflow – assign the appropriate workflow to the invoice
- Void – Voids the invoice, this is limited to certain user types
- Dispute – Mark the invoice as disputed which places it in your disputed queue and out of your pending approval queue. You can review further and rectify any issue before approving it forward to SBF AP.

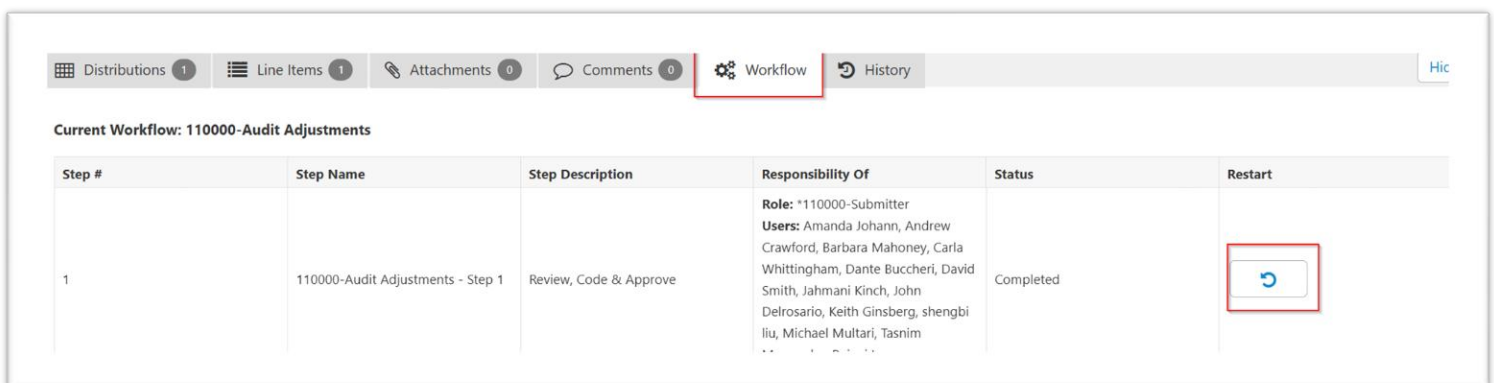


DISTRIBUTION AREA TABS

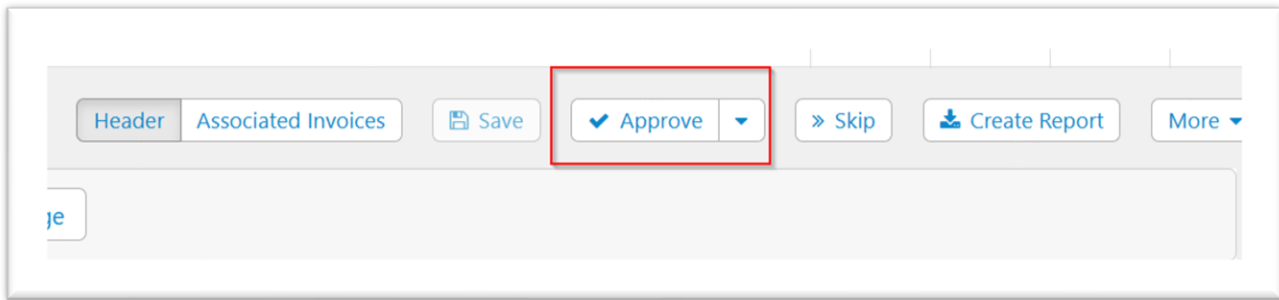
In addition to the distributions (coding) tab, there are other tabs that you may make use of:

- Line items: the line items tab typically will not be utilized, the only time anything would need to be done there is if the invoice header amount is changed. The unit cost on the line items tab must always match the invoice header amount
- Attachments: attachments may be added as backup documentation, attachments are not limited in type to PDF, they may be Word, Excel, image files, etc.
- Comments: The comments tab may be used to log and store comments with the invoice and optionally to email those comments to another user in the system
- Workflow: the workflow tab will display the details of the workflow the invoice is currently following
- History: the history tab captures all events and actions taken on the invoice by time, date and user

Verify that all information is accurate and complete. If for some reason the invoice needs to be sent back to the submitter, you can do so using the restart option in the workflow tab.

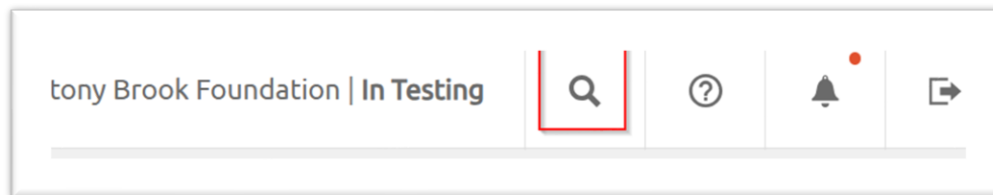


When you have completed your review, **Approve** the invoice forward to SBF for AP Review.



SEARCHING FOR INVOICES

The magnifying glass icon at the upper right will take you to Advanced Search where you can search for invoices using varying parameters/filters.



Enter your parameter/filter values:

You may enter as many filters as needed. Click the blue search button at the lower left to see your results.

A screenshot of a web form titled 'ADVANCED SEARCH CRITERIA' with a star icon. Below the title is a note: '(Results limited to items created 7 year(s) prior to today's date. * Inactive or Invalid)'. The form is divided into two columns of search criteria. The left column includes: 'INVOICE #' (text input), 'Starts With -' (dropdown), 'SUPPLIER STATUS' (dropdown), 'SUPPLIER ACCOUNT #' (text input), 'DEPARTMENT' (text input), 'INVOICE TYPE' (dropdown), 'DUE DATE' (dropdown with 'Any' selected), and 'BATCH STATUS' (dropdown). The right column includes: 'STATUS' (dropdown), 'SUPPLIER' (text input with 'DENNIS...' and a blue 'x' button, highlighted by a red box), 'PROPERTY STATUS' (dropdown), 'ORDERED BY' (dropdown), 'INVOICE DATE' (dropdown with 'Any' selected), 'CREATED DATE' (dropdown with 'Any' selected), and 'PO #' (text input).

If you are generating a search that you will use often, you may save it as a favorite. Search results may also be exported to .csv which will provide many more details than can be seen in the results grid. You may also use the Create Report option on invoices in your search results.

<div> <input type="button" value="Search"/> <input type="button" value="Clear All"/> <input type="button" value="Save"/> </div>											
INVOICE SEARCH RESULTS 5										<div> <input type="button" value="Export CSV"/> <input type="button" value="Create Report"/> </div>	
<input type="checkbox"/>		Invoice #	Department	PO #	Invoice Date	Due Date	Supplier	Status	Ordered By	Total	Workflow
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	100120	Employer Benefits		06/18/2025	07/18/2025	DENNIS J SELKOE (SBFND)	Pending Approval	Tasnim Mazumder	100.00	116700-Employer Benefits - Step 1
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	8025A	SBF ADP Payroll Clearing		06/04/2025	07/04/2025	DENNIS J SELKOE (SBFND)	Pending Approval	Lois Arens	850.00	116050-SBF ADP Payroll Clearing - Step 1
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	24524554	Audit Adjustments		05/19/2025	06/18/2025	DENNIS J SELKOE (SBFND)	Pending WorkFlow Assignment	Barbara Mahoney	200.00	
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>						DENNIS J SELKOE				

APPENDIX A

Examples to use in **INTERNAL MEMO/REMARKS FIELD** for **Business Justification**

- **Student Awards and Prizes**
 - As per the selection committee's review, John Jones best meets the prize or award criteria
 - Award for student doing research in the Humanities track – meets all criteria
 - Alumni Association's Dean's Choice Award recipient John Jones
 - Graduate Best Essay Award to John Jones
 - Payment to XYZ Dept Junior Research Award winner John Jones – meets all criteria
 - Recipient of XYZ Fellowship Fall 2025/2026
 - Academic prize for outstanding achievement to John Jones
 - Student housing stipend for 4 students in ABC Scholars program (names attached)
 - 2025 Physics stipend to John Jones
- **Travel and business meal expenses for staff, faculty, candidates, visitors**
 - 2 night hotel stay for XYZ Department Chair candidate, John Jones
 - Lunch interview with candidate John Jones for Director position in XYZ Dept
 - Car service to 2025 CASE Conference in New York City
 - Catering for Fellowship orientation breakfast in Dept XYZ
 - Car service roundtrip LGA airport for Dr Jones of Harvard to attend SBU Campus Conference
 - Breakfast for all -staff meeting for XYZ Dept.
 - Dinner with John Jones, guest speaker of ABC Lecture Series, and faculty members
- **Miscellaneous payments to vendors**
 - Flyer and brochure printing for Fall 2025 XYZ Gala event
 - Print advertising for Summer 2025 theatre shows
 - Advertising and publication expenses for sponsored sign at XYZ event
 - Polo shirts and hoodies for promotional purposes in XYZ Dept
 - Annual membership for Dr. Jones for ABC Organization
 - Giveaway items for 2025 Homecoming event sponsored by XYZ Dept
 - 5 new laptops for staff in XYZ Dept to replace non-working laptops
 - Copy editing and proofreading services for the XYZ annual report
 - Expenses for ABC Corporation, a training workshop for public speaking, for XYZ dept team members
- **Payments to SBU (to an IFR account) and RF (to an RF account)**
 - Wang rental space for staff meeting of XYZ Dept – to IFR #_____
 - Dr. Jones' use of iLab for research purposes – to RF #_____
 - Reimburse IFR #_____ for food expenses at XYZ event
 - \$3,000 extra service to John Jones to IFR#_____ supported by ABC program
 - Offset salary for John Jones, employee in ABC dept, to RF #_____