

Business Center Specialist Document Checklist

Use this checklist as a quick reference to confirm what documents are needed before processing each request. To help maintain consistency, please use the same language when communicating with departments about what is needed.

Task	Required Documents	Important Details
ICA	- ICA checklist / ICA BP Logix form - Invoice - Resume	Confirm all required ICA documentation is included before submission.
Appointments - New Hires	- CBC - HR onboarding clearance - PAC from Recruit & Fill - Phone Number	Use for new hire appointment processing.
PAC	- Recruit & Fill spreadsheet - Job description	For report-to changes, include the position number of the report-to person in the comments.
JAC - Extend Appointment	No documents required	Use for appointment extensions only.
JAC - Funding Changes	Approval or directive email	Keep the email for documentation of the change.
Separations	Resignation letter	Required for separation processing.
Affiliate Request	- CBC - Copy of ID front and back	Required for Affiliate appointments
Budget Transfer	Directive or approval email	Make sure the approval is clearly documented.

Reclassification	• Document ID from Budget Overview • Approval or directive email	The department must provide the document ID.
Reimbursement	• Entertainment expense form • Receipts	All reimbursements require both items.
Travel Authorization	• No documents required	Amount to encumber must be entered
Travel Reimbursements	• Flight itineraries • Approved TA • Receipts for out-of-pocket expenses • Hotel invoices if applicable	For international travel, an approved IOC is required.
Vendor Payments	• Current invoice	For travel card payments, also include receipts and statements.
Purchase Orders	• Quote • Approval • Mockup	Memberships are processed as direct pay.
SNOA	• Department spreadsheet with student names, student IDs, and amounts • IRS questionnaire	Review the spreadsheet carefully for completeness before processing.
Additional Pay	• Approval or directive email	Retain the email as supporting documentation.