

# 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                      | <ul style="list-style-type: none"> <li>ICA checklist / ICA BP Logix form</li> <li>Invoice</li> <li>Resume</li> </ul>                              | Confirm all required ICA documentation is included before submission.                       |
| Appointments - New Hires | <ul style="list-style-type: none"> <li>CBC</li> <li>HR onboarding clearance</li> <li>PAC from Recruit &amp; Fill</li> <li>Phone Number</li> </ul> | Use for new hire appointment processing.                                                    |
| PAC                      | <ul style="list-style-type: none"> <li>Recruit &amp; Fill spreadsheet</li> <li>Job description</li> </ul>                                         | 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    | <ul style="list-style-type: none"> <li>Approval or directive email</li> </ul>                                                                     | Keep the email for documentation of the change.                                             |
| Separations              | <ul style="list-style-type: none"> <li>Resignation letter</li> </ul>                                                                              | Required for separation processing.                                                         |
| Affiliate Request        | <ul style="list-style-type: none"> <li>CBC</li> <li>Copy of ID front and back</li> </ul>                                                          | Required for Affiliate appointments                                                         |
| Budget Transfer          | <ul style="list-style-type: none"> <li>Directive or approval email</li> </ul>                                                                     | Make sure the approval is clearly documented.                                               |

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| Reclassification      | <ul style="list-style-type: none"> <li>• Document ID from Budget Overview</li> <li>• Approval or directive email</li> </ul>                                                          | The department must provide the document ID.                         |
| Reimbursement         | <ul style="list-style-type: none"> <li>• Entertainment expense form</li> <li>• Receipts</li> </ul>                                                                                   | All reimbursements require both items.                               |
| Travel Reimbursements | <ul style="list-style-type: none"> <li>• Flight itineraries</li> <li>• Approved TA</li> <li>• Receipts for out-of-pocket expenses</li> <li>• Hotel invoices if applicable</li> </ul> | For international travel, an approved IOC is required.               |
| Vendor Payments       | <ul style="list-style-type: none"> <li>• Current invoice</li> </ul>                                                                                                                  | For travel card payments, also include receipts and statements.      |
| Purchase Orders       | <ul style="list-style-type: none"> <li>• Quote</li> <li>• Approval</li> <li>• Mockup</li> </ul>                                                                                      | Memberships are processed as direct pay.                             |
| SNOA                  | <ul style="list-style-type: none"> <li>• Department spreadsheet with student names, student IDs, and amounts</li> <li>• IRS questionnaire</li> </ul>                                 | Review the spreadsheet carefully for completeness before processing. |
| Additional Pay        | <ul style="list-style-type: none"> <li>• Approval or directive email</li> </ul>                                                                                                      | Retain the email as supporting documentation.                        |