BSOE PayPal Account Item Creation Form

Instructions for Completion (refer to page 2 of this form): Item-sponsoring Unit to complete Parts A - D; original copy needs to be signed in ink at the appropriate levels.

Forward original form to the BSOE PayPal Financial Sponsor @ M/S: BSOE/BO

A. ITEM-SPONSORING UNIT/DEPT INFORMATION

CONTACT NAME: _____ **PHONE:** _____ **EMAIL:** _____ **MAILSTOP:** _____

B. ITEM INFORMATION (activity, event, product, etc.)

ITEM NAME (e.g. workshop name, event name): _____ **EVENT DATES** (if applicable): _____

DATES OF ANTICIPATED PAYPAL ACTIVITY: **START DATE (Required):** _____ **END DATE:** _____

ITEM AMOUNT(S): enter (or attach) a list of all amounts to be charged to customers via your PayPal-linked website. Please note that PayPal charges a transaction fee of $0.30 per transaction + 2.2% of the transaction total.

AMOUNT	DESCRIPTION	SALES TAX APPLICABLE
		☐
		☐
		☐

C: REVENUE FOAPAL - REQUIRED (contact assigned Tier-2 Budget Approver/Research Accountant for assistance)

FUND: _____ **ORG CODE:** _____ **ACCOUNT CODE:** _____ **ACTIVITY CODE:** _____

D: AUTHORIZATION/APPROVALS:

by signing this form, each person listed below is consenting to: 1) the creation of a PayPal item; 2) that they have read and understand the roles and responsibilities outlined in the BSOE PayPal Account Overview document (also available on the BSOE website); and 3) they are willing to participate in the maintenance of the PayPal account throughout the duration of the proposed PayPal service.

ITEM SPONSOR: _____
Print Name Signature Date

TIER-1 FUND MANAGER: _____
Print Name Signature Date

TIER-2 BUDGET APPROVER: _____
Print Name Signature Date

Once the above is complete; forward original form to the BSOE PayPal Financial Sponsor via campus mail (BSOE/ BO) or email (hrvander@ucsc.edu)

For more detailed information on the BSOE PayPal service, please refer to the BSOE Administration webpages Questions?
Contact current BSOE PayPal Financial Sponsor: Hannah Vanderlinden; hrvander@ucsc.edu; 9-1414

BSOE BUSINESS OFFICE REVIEW (to be completed by BSOE Business Office)

FINANCIAL SPONSOR: BSOE-Finance Office
Print Name Signature Date

TECHNICAL SPONSOR: ITS-Technology
Print Name Signature Date

PAYPAL ITEM TYPE: ☐ SINGLE USE ITEM ☐ MULTIUSE REGISTRATION

BSOE PayPal Item Creation Form INSTRUCTIONS

COMPLETING THE PAYPAL ITEM CREATION FORM:

STEP 1: PART A - ITEM-SPONSORING UNIT/DEPARTMENT INFORMATION

- Point of contact information. The individual responsible for liaising with Business Office

STEP 2: PART B - ITEM INFORMATION

- **ITEM NAME:** Provide the name of your event or activity (e.g. 'Research Review Day 2011' or 'BSOE Workshop Registration.'
- **EVENT DATES:** if an event (including workshops or conferences), please provide the actual event dates
- **DATES OF PAYPAL ACTIVITY:** please indicate the dates of anticipated PayPal activity (i.e. the start and end dates of when the associated webpage will be 'live' and you anticipate usage)
- **ITEM AMOUNT(s):** enter (or attach) a list of the individual rates that will be charged to your customers via PayPal (please provide a brief description and indicate whether sales tax will be applicable). When calculating the amount to charge, note that PayPal charges a transaction fee of $0.30 per transaction + 2.2% of the transaction total.
- **SALES TAX:** If the item-sponsoring unit is selling physical goods, the financial sponsor is responsible for noting the amounts of sales tax to be accrued on the spreadsheet sent to General Accounting.

STEP 3: PART C - REVENUE FOAPAL - REQUIRED: for assistance determining appropriate FOAPAL, please contact your assigned Budget Approver/Research Accountant)

- Note that both a Revenue Fund Number (66780) and Revenue Account Code (R66780) are provided and must be used.

STEP 4: PART D - AUTHORIZATION/APPROVALS

Obtain signatures in the following order

1. Item Sponsor
2. Tier-1 Funding Authorizer
3. Tier-2 Budget Approver

STEP 5: SUBMIT TO BSOE BUSINESS OFFICE

- Once parts A-D are complete, please forward the ORIGINAL form to the BSOE Business Office, attention of 'BSOE PayPal Financial Sponsor' (M/S BSOE/BO)
- The Business Office will complete their review, obtain signatures from the Financial Sponsor and the Technical Sponsor, and notify all signatories when complete.

Where to get help: please refer to the BSOE PayPal Account Overview page of the BSOE website for general information about the BSOE PayPal Account; the various roles and responsibilities of the parties involved; and the technical aspects of establishing your dedicated BSOE webpage.