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Budget & Finance Resources

Contacts

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Useful Links

- Procurement & Travel Reference Guide
- Travel Expense Reimbursement Form
- CU Accounting Policies & Procedures
- Travel & Procurement Card Application - Once you fill out and sign the application, please send it to Daisy Salazar.

Fiscal and Purchasing Information

Making a Purchase

1. All purchase requests should be submitted using the **SEHD Procurement Request Form.** This should be the primary method of purchasing goods.
2. If your request cannot be completed by the SEHD Finance team, you may make the purchase yourself and request reimbursement (*restrictions apply, see below). ASAP after purchase (must be within 60 days of purchase), please email a copy of the *itemized* receipt to your corresponding Concur delegate if applicable. Contact **Keiko Goldman** for general fund, extended studies, program and professional development account purchases, and **Jamie Purevsuren** for grant related purchases. Make sure the receipt has the following information: what the item was, the date, and the payment amount. Also include in your email the speedtype to be charged **and the business purpose for the purchase (includes brief description of how the purchase benefits the university)**. The reimbursement will be deposited in your bank account within two business days after it is approved through Concur. Please contact your Concur delegate with any questions. ***Please note*** *: Any purchase that is not in compliance with University & SEHD policy will NOT be reimbursed. If you are unsure/have questions, please contact your corresponding fiscal staff* **before** *making a purchase.*
3. If you are making a purchase using PD funds, program funds or any other University funding source, please ensure the budgets have been approved and that there are funds available **before** anything is purchased. Please check with Daisy regarding your available funds.
4. **All IT/Tech related purchases must go through the SEHD Tech Team via the SEHD Procurement Request Form.**
5. Gift card purchases MUST include a Gift Card Authorization Form and must be approved prior to

making the purchases. Please contact **sehdfinance@ucdenver.edu** to check the requirements for gift cards. Gift card purchases will not be reimbursed.

6. As a public institution of higher education of the State of Colorado, the University of Colorado is generally exempt from most federal taxes and from all Colorado State and local government sales tax. The purchase must be made using the University Procurement Card or a university purchase order. (If an employee makes the purchase with personal funds - with the intention of subsequently requesting reimbursement from the University - then the purchase is not tax exempt, even if the employee presents a university tax-exemption number.)

Travel

> If you are a frequent traveler (3 or more trips/year), please email **sehdfinance@ucdenver.edu** about obtaining a university travel card.

First, please check with your corresponding fiscal staff to ensure funds are available to cover the pending trip expenses. For international travel, please submit a Concur travel request for the Dean's approval. Once this has been approved, you may move on to the next step and contact Christopherson.

1. All **airfare purchases** need to be made through Christopherson Business Travel by contacting them directly or through [Concur in the employee portal](). CU travel procedures allow an exception to this policy under one of these circumstances:
    1. The fare is not available for purchases through the University Travel Program. Limitations could be related to international in-country travel, remote travel, etc.
        1. Exceptions for these fares must pe approved prior to purchase by emailing an exception request to **psctravel@cu.edu** .
    2. Significant cost savings are demonstrated to the Univesity. The quote will have to be attached to the Concur report with your airfare expense.
        1. For an internet airfare purchase to demonstrate significant cost savings, all of the following requirements must be fulfilled:
            1. Obtain comparison quote from Concur dated on or prior to the date of the internet purchase. If you cannot locate the exact fare in Concur, contact a CBT agent. The comparison quote must be for the exact itinerary- same travel dates, times, routes, and airline(s) as the planned internet purchase.
        2. When compared to the quote from Concur or CBT, the cost of the internet airfare purchase must be:
            1. $50 less for domestic flights
            2. $200 less for international flights.
2. Airfare comparison quote **required** if vehicle travel is determined to be lower cost than airfare.
3. You will need to make your own arrangements for **lodging**. You may use a travel card to book lodging.
4. **Conference Registrations**
    1. To have your registration handled by SEHD, fill out this [Conference Registration form]() **prior** to the conference. Registrations paid for by employees cannot be reimbursed until after the travel has been completed.
    2. If you want to be reimbursed for items such as hotel, taxis, shuttles, parking, etc., please keep your itemized receipts and turn them in to your corresponding Concur delegate

when you return. Again, reimbursement cannot occur until after travel is completed. Conference agenda MUST be provided for reimbursement! The agenda must include the name and dates of the conference as well as a breakdown of the schedule. Please refer to the following link for more information/important travel guidelines https://www.cu.edu/psc/travel.

5. Meals/food will be reimbursed at the per diem rate only per university policy. There is no need to keep food receipts when traveling. Per Diem rates can be found at the following link http://www.gsa.gov/portal/content/104877. You may NOT request per diem reimbursement for any meals that are provided at the conference, even if you don't eat the provided meals.

6. Mileage calculations MUST deduct **normal round-trip commute** to primary work location–regardless of type of transportation used for normal commute; see mileage calculation guidelines.

Food Purchases

1. All food purchases must be made according to university policy. This means that food cannot be ordered for the following types of events: program meetings, staff meetings, meetings with only SEHD personnel attending and going away parties (unless the person is retiring). One time and irregular events may be approved by going through the Dean's Office. Please contact Patricia Ball for approval. Any events that are not according to University Policy will constitute a personal expense that will NOT be reimbursed. If you have a P-card and make an unauthorized purchase, this will constitute a personal expense that will need to be paid back to the School.

2. Training events MUST include an agenda and list of attendees.

3. Campus pre-approval is required for any alcoholic beverages.

4. For small a dollar amount food purchase, you may purchase this yourself and submit to your corresponding fiscal staff for reimbursement. Remember you must submit an itemized receipt for all purchases.

5. For food purchases for official function events, please complete the SEHD Purchase Request Form or contact JáNet Hurt for assistance/with questions. You MUST provide a list of attendees for an official function event.

6. All food purchases must be included in an approved budget or be approved (in writing) by the Dean's Office.

7. We are only allowed to tip up to 20% so please keep this in mind when tipping.

Fiscal and Purchasing Information

Making a Purchase

1. CU Marketplace and Procurement Cards should be the **primary method of purchasing** goods. All purchase requests should be submitted using the **SEHD Procurement Request Form.**

2. If your request cannot be completed by the SEHD Finance team, you may make the purchase yourself and request reimbursement (*restrictions apply, see below). ASAP after purchase (must be within 60 days of purchase), please email a copy of the *itemized* receipt to your corresponding Concur delegate (**Daisy Salazar** for general fund, professional development account, and extended studies purchases and **Sophie Eggert** for grant-related purchases). Make sure the receipt has the following information: what the item was, the date, and the payment amount. Also include in your email the speedtype to be charged **and the business purpose for the purchase (brief description of how the purchase benefits the**

university). The reimbursement will be deposited in your bank account within two business days after it is approved through Concur. Please contact your Concur delegate with any questions. **Please note** : *Any purchase that does not comply with University & SEHD policy will NOT be reimbursed. If you are unsure/have questions, please contact your corresponding fiscal staff* **before** *making a purchase.*

3. If you are making a purchase using PD funds, program funds or any other University funding source, please ensure the budgets have been approved and that there are funds available **before** anything is purchased. Please check with Daisy regarding your available funds.
4. For PD funds, each program now has their own PD account speedtype. If you don't know your PD speedtype, please contact Daisy.
5. **All IT/Tech related purchases (including software) must go through the SEHD Tech Team via the [SEHD Procurement Request Form.](#)** Software (including software renewal) requires campus Risk & Compliance pre-approval and Purchasing & Contracts pre-approval. The SEHD Dean's Office submits these requests for approval, so please make sure to submit a request for software. Any IT/Tech related purchases that are not pre-approved by the SEHD Tech Team will not be reimbursed. Software requests may take anywhere from two to twelve weeks to be approved, so please submit your request with time.
6. **Gift card** purchases MUST include a Gift Card Authorization Form and must be approved prior to making the purchases. Please contact Daisy to check the requirements for gift cards.
7. As a public institution of higher education of the State of Colorado, the University of Colorado is generally exempt from most federal taxes and from all Colorado State and local government sales tax. The purchase must be made using the University Procurement Card or a university purchase order. (If an employee makes the purchase with personal funds - with the intention of subsequently requesting reimbursement from the University - then the purchase is not tax exempt, even if the employee presents a university tax-exemption number.)

Travel

> If you are a frequent traveler (3 or more trips/year), please see Daisy Salazar about obtaining a university travel card.

First, please check with your corresponding fiscal staff to ensure funds are available to cover the pending trip expenses. If the funds are available, please submit a Concur travel request for approval. **All trips require pre-approval**. This includes domestic, international and in-state travel if an overnight stay is included. Once this has been approved, you may move on to the next step and book your travel through Concur or through Christopherson.

1. All airfare **must** be booked through Concur or Christopherson. Please note that the University policy has changed and external internet airfares will **not** be reimbursed.
2. Air travel should be arranged through Christopherson by either contacting them directly or through [Concur in the employee portal.](#)
3. You will need to make your own arrangements for lodging. You may use your travel card to pay for lodging. If you don't have a travel card, please submit an itemized receipt for reimbursement upon your return from the trip.
4. **Conference Registrations**
   1. To have your registration handled by SEHD, fill out this [Conference Registration form](#) **prior** to the conference. Registrations paid for by employees cannot be reimbursed until after the travel has been completed.

2. If you want to be reimbursed for items such as hotel, taxis, shuttles, parking, etc., please keep your itemized receipts and turn them in to your corresponding Concur delegate (Daisy, Keiko, Sophie, Jamie) when you return. Again, reimbursement cannot occur until after travel is completed. Conference agenda MUST be provided for reimbursement! The agenda must include the name and dates of the conference as well as a breakdown of the schedule. Please refer to the following link for more information/important travel guidelines https://www.cu.edu/psc/travel.

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2. Training events MUST include an agenda and list of attendees.
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4. For food purchases for official function events, please complete the SEHD Purchase Request Form or contact JáNet Hurt for assistance/with questions. You MUST provide a list of attendees for an official function event.
5. All food purchases must be included in an approved budget or be approved (in writing) by the Dean's Office.
6. We are only allowed to tip up to 20% so please keep this in mind when tipping.

Professional Development Funds Policy

Purpose of PD Funds

The purpose of Professional Development (PD) funds in the SEHD is to support faculty research and creative activities. These funds may be used in a variety of ways including: travel, conference attendance/presentations, GA/RA/student support, books, professional memberships, software, workshops, and other purposes approved by the dean.

Definitions

Allocated PD*

Amount given to faculty annually (from Program funds or School funds), at the beginning of the fiscal year, based on faculty rank (Sr. Instructor, Associate Professor, etc.). Allocation amounts are established by the SEHD, applied consistently across programs, and are prorated if less than 1.0 FTE.

Earned/Awarded PD

Includes all funding such as awards from ORS, YUMPS, RIA, Center for Faculty Development, additional pay as PD, etc. Please keep in mind that it is an irrevocable choice to take PD funds instead of salary.

Spending Policies

If a faculty member is awarded a large RIA, ORS, or other similar funds, a separate speed type is created. Research Faculty provide their own PD funds through RIA.

Earned/Awarded funds are not affected by annual adjustments by the School.

Purchases from PD funds must adhere to purchasing rules and are considered university property.

University property must be returned to the school upon separation of employment with the SEHD.

Upon retirement/resignation/termination of appointment with SEHD, the faculty member's unspent PD fund balance (allocated and earned/awarded) goes to the school's administrative account.

Time Limits

Offer letters will state a 5-year limit to use startup funds. Individuals can apply for a one-year extension with a plan for how funds will be used. (*Note: I am extending the start-up funds to 5 years because these are meant to support quest for tenur*e.)

Dollar Threshold

Beginning in FY21-22, **allocated** PD funds are capped at two years' allocation amount (current 1.0 FTE rates are $4,000 for tenure track, $2,400 for clinical, and $2,000 for senior instructors; prorated at less than 1.0 FTE). An individual's annual allocation will be adjusted, if necessary, so as not to exceed this threshold.

Effective FY21-22, if an individual's **allocated** PD balance is over the cap, **allocated** funds will be reduced and returned to the original source until the PD balance reaches the threshold amount. **Earned/awarded** funds will **not** be reduced or returned.

*Footnotes

Current 1.0 FTE annual allocation amounts (pro-rated at less than 1.0 FTE):

- $2,000 to Tenured/Tenure track faculty
- $1,200 to Clinical faculty
- $1,000 to Instructors/Sr. Instructors

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