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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 sehdfinance@ucdenver.edu.

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. All purchases must have prior approval from the budget authority (generally a faculty member's program leader, Associate Dean or the Dean) before reimbursements will be processed. This is best done through email with the approval copied or sent to the finance team. Original itemized receipts should be submitted to your corresponding Concur delegate. Contact **Daisy Salazar** for general fund, extended studies and professional development account purchases and services, and **Jamie Purevsuren** for grant related purchases.
3. *Supplies must be ordered through the state vendor, STAPLES, through our CU Marketplace vendor system.* Business cards should be ordered using the following link: <http://www.ucdenver.edu/about/departments/printing/Pages/OnlineOrdering.aspx>
4. All personnel hiring, services and scope of work purchases must be pre-approved BEFORE the work has started. If prior approval has not been obtained before the work or service begins, the University may deny reimbursement and this could become a personal expense to you. Please contact SEHDFinance@ucdenver.edu for general fund, extended studies, and professional development account purchases and services, **Hiromi Agena** for faculty pay, and **Jamie Purevsuren** for grant-related purchases.
5. 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.*

6. 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.
7. **All IT/Tech related purchases must go through the SEHD Tech Team via the [SEHD Procurement Request Form](#).**
8. 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.
9. 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 be approved prior to purchase by emailing an exception request to psctravel@cu.edu.
 2. Significant cost savings are demonstrated to the University. 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. For **combined business and personal trips**, the **airfare** must be booked through Concur or CBT. You will still need to obtain a comparison quote documenting the cost of the business-only fare prior to or on the date of purchase and attach it to the Concur report. If the extended trip results in a greater cost, the difference will need to be paid by the traveler.
3. Airfare comparison quote **required** if vehicle travel is determined to be lower cost than airfare.
4. You will need to make your own arrangements for **lodging**. You may use a travel card to book lodging.
5. **Conference Registration** methods for payment are:
 1. To have your registration handled by SEHD, fill out this [Conference Registration form](#) **prior** to the conference.
 2. Pay for the registration yourself and submit the receipt to SEHDFinance@ucdenver.edu for reimbursement **after** the travel has been completed.
 3. Pay via CU Procurement Card (P-Card).
6. 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>.
7. 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>.
8. 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.
9. On days of travel, the final destination for the day determines the traveler's per diem rate all day. However, on the day traveler returns home, the city from which the traveler leaves determines the per diem rate.
10. On begin and end travel days, reimbursement cannot exceed 75% of the daily M&I (meals and incidentals) per diem rate. If travel is wholly within a single day and the trip lasts 12 hours or more, then meal reimbursement is allowed. Reimbursement cannot exceed 75% of the daily M&I per diem rate. Per IRS regulations, meal reimbursements for single-day trips are reportable as income for CU employees.
11. 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](#).

Reimbursement is **NOT** appropriate for:

- On-campus parking (Be sure to apply for re-entry privileges if you come & go to prevent payment more than once a day.)
- Parking tickets from the police
- Driving off-campus to have lunch with other professionals, even for purposes of business
- Lunch with SEHD/University colleagues
- Other expenses that are denied by a dean (Please check in advance if you think there will be any concerns or questions!)

Student Travel

All student travel must be approved prior to making any travel arrangements by the faculty member or program paying for their expenses. Students are able to book their flight through Concur Travel & Expense System or Christopherson as long as they are provided with a speed type. Students are also able to submit a conference registration request using the SEHD Impact Form (https://ucdenverdata.formstack.com/forms/sehd_conference_registration) to have the conference registration handled by and paid for by SEHD. For all other expenses, students will have to use personal funds and then submit receipts for reimbursement upon their return to the corresponding Concur delegate. Contact SEHDFinance@ucdenver.edu for general fund, extended studies and professional development account purchases and services, and **Jamie Purevsuren** for grant related purchases.

Following is a link to the Procurement Service Center website which answers all questions about travel including a step by step guide: <https://www.cu.edu/psc/payables/travel.htm>

If additional assistance is needed, please email SEHDFinance@UCDENVER.EDU.

Frequently Addressed Travel Questions

Alcoholic Beverages: Not reimbursable in general; only covered when part of an official function, when entertainment account funds are available, and when proper University signatures have been obtained IN ADVANCE! This requires an Official Function form regardless of dollar amount. Not to be paid with sponsored project funds unless authorized by the sponsor.
Lodging-Staying with Friends: Travelers who arrange private lodging (staying with friends/family) can be reimbursed up to \$25/day for associated costs.
Mileage-Personal Vehicle: Reimbursable, using the current State rate of \$0.59 per mile, \$.62 a mile for 4-wheel drive vehicles (when necessary for road conditions at the time of travel).
Mileage vs. Airfare-Traveler’s Option: Traveler will be reimbursed for driving cost (mileage, lodging, meal per diems) up to actual total flight cost (transportation to/from DIA, airfare, destination ground transportation). Calculation of airfare cost is based on lowest obtainable 14-day advance fare. If the traveler is planning on purchasing a flight outside of Concur, please talk to Daisy Salazar for required documentation to make sure reimbursement won’t be a problem. Traveler must declare annual leave for any additional days required as a result of alternative travel. Additional Information may be required.
Parking: Reimbursable when it is a necessary part of the trip, e.g., parking at traveler’s destination, parking at DIA.
Personal Expenses: Expenses incurred for traveler’s benefit—e.g., magazines, dry cleaning, movie rentals, other entertainment—are NOT reimbursable.
Procurement Card: University Visa. Not used for travel expenses. Exception: Can be used for conference/event registration, if accepted by vendor.
Receipts: Travelers must submit original itemized receipts (credit card receipts/statements are not acceptable) for all individual charges. Exceptions: All rental vehicle gas receipts are required regardless of dollar amount. All receipts are required for lodging expenses incurred except Lodging-Staying with Friends. No receipts are needed to claim meal per diems. <i>NOTE:</i> The University is requesting an exemption from this rule. We will keep you updated on the status of the request.
Rental Car Expense: Rental Cars must be rented using the University travel card because it automatically provides insurance coverage. The following is a link to the State’s rental car policy which lists approved automobile rental vendors and other information about each vendor. http://www.colorado.gov/cs/Satellite/DPA-DCS/PA/1201542229336

Receipts are always required for reimbursement of car rental costs and for rental car gasoline purchases regardless of dollar amount. (Note: If travel is covered by sponsored project funds, rental vehicle use will be determined by sponsor policies and may not be allowed).

Tax Implications: Per IRS regulations, the Concur expense reallocation and all supporting documentation must be received in the PSC Travel Office within 90 days of trip completion to avoid having reimbursement reported as income.

Telephone/Fax/Modem Line Charges: Charges for University business are reimbursable. You will receive \$5.00 per day in incidentals – which includes any personal telephone charges.

Tips: Reasonable tips given to bellhops, porters, maids, and ground transportation personnel are reimbursable. Exception: Tips on meal service already included in the meal allowance and cannot be claimed separately. University Policy limits tips up to 20%.

Toll Road Charges: These charges are a reimbursable expense only if they are not part of the daily commute.

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@ucdenver.edu for approval.
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.

Program and Administrative Unit Spending and Budgets

Administrative managers and program leaders will receive a program budget template at the beginning of the fiscal year for use in planning their budget for the year. Zero-based budgeting is used in the formulation of both these budgets (i.e. starting from scratch). The requested budget will then be reviewed by the Assistant Dean and the Dean. Approved budgets will then be entered into the PeopleSoft system and spending should be monitored by the program or administrative unit manager. At fiscal year-end (6/30/XX) remaining funds for administrative units do NOT roll forward to the next year.

Remaining program funds roll forward year after year. Program budgets should only include items that pertain to the program as a whole and not expenses for individual faculty. For example, a retreat or marketing expense for the benefit of the program would be an appropriate program expense. A faculty member's conference travel, registration fee or membership dues to various organizations would not be an appropriate program expense but would be an appropriate expense for faculty professional development funds.

Please contact SEHDFinance@ucdenver.edu to obtain your professional development fund balance prior to making purchases.

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 tenure.*)

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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