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# Budget & Finance Resources

## Finance and Budget Services Staff Contact Information

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## Grants and Contracts

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Grants & Contracts Program Manager

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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](mailto: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.)

## 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](mailto: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](mailto:SEHDFinance@ucdenver.edu) to obtain your professional development fund balance prior to making purchases.

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