

Clone of Seek Sandbox ^[1]

Legend: 🗑️ = Additional Approval Required 📁 = Special Fund Use

| ITEM (GOODS/SERVICES) | ALLOWABILITY | CONDITIONS |
|--|--------------|---|
| Alcoholic Beverages Expenses | | |
| For official functions | Yes | PPS Alcoholic Beverages Purchased for University Events |
| For donor cultivation, solicitation, and stewardship official functions | Yes | PPS Alcoholic Beverages Purchased for University Events |
| For fundraising events | Yes | PPS Alcoholic Beverages Purchased for University Events |
| For conferences hosted by CU | Yes | PPS Alcoholic Beverages Purchased for University Events |
| For employees in travel status | No | Note, however, that official functions may occur in travel status, in which case official function procedures apply |
| For resale by a licensed establishment | Yes | |
| For research purposes and for purposes that do not include personal consumption (e.g., using alcohol as an ingredient in the preparation of food or for cleaning costumes) | Yes | |
| Automobile - Related Expenses | | |
| University - owned vehicle expenses | Yes | APS Operation of University Vehicles |
| Commercial vehicle rental expenses or trip fares, or taxi/shuttle service | Yes | |
| Private vehicle expenses | Yes | (only mileage is reimbursable) |

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|--|--------------|---|
| Insurance | Yes | |
| Moving or stationary vehicle violation tickets | No | |
| Break Room Equipment Expenses | | |
| Basic equipment for taking meals or snacks within the workplace, such as simple refrigerators, microwaves, stoves, coffee pots, toasters, water filtration | Yes | |
| Equipment for employee entertainment, such as televisions, stereos, VCRs, DVD players | No | |
| Conference Expenses | | |
| Costs of conferences hosted by CU | Yes | It is assumed that wherever possible, conference registration fees cover the cost of food, decorations, awards and other needs of the conference |
| Costs of attendance at conferences hosted by other entities | Yes | |
| Donation Expenses | | |
| Donations to other entities including food, travel, and other expenses in support of the donation | No | Unless waiver obtained as set forth in the |
| Donor Cultivation, Solicitation, and Stewardship Expenses | | |
| Incurred to raise support for the University or University of Colorado Foundation | Yes | Requires use of advancement/development funds (Fund 36) If including what would otherwise be considered fundraising events, see Accounting Handbook Chapter Fundraising Events See also Fundraising Expenses, below |
| Fetal Tissue | | |

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|--|--------------|--|
| Human | Yes | Requires requisition in CU Marketplace regardless of dollar amount Requires purchase from authorized supplier - contact for additional assistance |
| Flowers, Fruit Baskets, and Greeting Cards | | |
| For decorative purposes associated with an official function | Yes | |
| For expressing holiday, get-well, or congratulation wishes | No | |
| For community relations (external) support/indications of goodwill or esteem, restricted to individuals or organizations who have, or may have, connections to the system or campus instructional, educational, research, or public service missions | Yes | Requires approval by the appropriate officer |
| For donor cultivation, solicitation, and stewardship | Yes | Requires use of advancement/development funds (Fund 36) |
| For expressing condolences upon the death of current students | Yes | Requires approval by the appropriate officer |
| For all major life events for the employee or immediate family member of the employee. Per the Administrative Policy Statement (APS) <u>Glossary</u> ^[6] definition, <i>Immediate family is a spouse, domestic partners, civil union partner or dependent child.</i> (Note that major life events, as considered by this procedural statement, are birth, death, and significant illnesses. Birthdays and minor illnesses—e.g., colds and flu—are not covered.) | Yes | Requires approval by the appropriate officer |
| Food and Related Consumables | | |
| Food and related consumable items for the employee's personal consumption (not in travel status and not at official functions) | No | |
| Consumable items necessary to maintain the cleanliness of employee break room, such as paper towels, dish detergent, and sponges. Does not include items such as plates and silverware. | Yes | |

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| Beverage service available in the general public area or reception area of an organizational unit hosted by a university employee who is either at/above the level of Chair/Director (prohibited in individual offices of university employees) or who is involved in donor cultivation, solicitation, and stewardship activities | Yes | Service must be intended for official guests of the University (i.e., non-employees) For donor cultivation, solicitation, and stewardship, requires use of advancement/development funds (Fund36) |
| Food for events | | |
| For official functions—common types of events include: | Yes | For all these events, see |
| Community relation functions, external - directly related to University's instructional/research/public service mission; | Yes | |
| Donor cultivation, solicitation, and stewardship official functions; | Yes | Requires use of advancement/development funds (Fund 36) See also Donor Cultivation, Solicitation, and Stewardship Expenses, above |
| Employee recognition/appreciation events and retirement functions; | Yes | For recognition events, see also Recognition Expenses, below |
| Goodwill functions - for official guests/volunteers to indicate goodwill or esteem; | Yes | |
| Recruitment functions - to enlist new employees, faculty, post-/pre-doctorates, student athletes, etc.; | Yes | For recruitment functions, see also Recruiting Costs for Prospective Employees/Students, below. Note that for student athletes, athletic policies also apply |
| Training functions; | Yes | For training functions, see also Training Expenses, below |

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| Multi-campus or multi-unit (i.e., not reporting to the same officer) events; | Yes | For multi-unit or multi-campus events, the participating units may not report to the same officer, and the events may not occur more often than monthly. (Appropriate vice chancellor can approve single-unit meetings or meetings more frequent than monthly.) |
| Student functions - hosted for students, and directly related to student/educational development (e.g., student recognition, student recruitment, and student program development) | Yes | |
| Student residential life activities/functions | Yes | |
| Conferences | Yes | See Conference Expenses, above |
| Fundraising events | Yes | See also Fundraising Expenses, below |
| Meals for employees in travel status | Yes | |
| Fundraising Expenses | | |
| Incurred to raise support for the University | Yes | See also Donor Cultivation, Solicitation, and Stewardship Expenses, above |
| Gifts or Tokens | | |
| For employees, associates, and other individuals (including students), in the form of cash or non-cash items | Yes | See Recognition Expenses, below |
| For supporting organizations as an indication of goodwill or esteem or event-related advertisement | | |
| Cash (given as a donation) | No | See Donations, above |
| Non-cash | Yes | |

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| For donor cultivation, solicitation, and stewardship | | See Donor Cultivation, Solicitation, and Stewardship, above Requires use of advancement/development funds (Fund 36) |
| For employee recruitment | | See Recruiting Costs for Prospective Employees/Students, below |
| Internet Connections from a Personal Location | No | Unless approved on a temporary basis by the appropriate Vice President or Vice Chancellor of Finance or her/his designee |
| License Fees, Memberships, or Dues | Yes | |
| Moving Expense Reimbursement (includes House Hunting Expenses) | Yes | |
| Parking | | |
| Fees paid by employee at a primary work location | No | |
| Tickets (received either on or off campus) | No | |
| Fees associated with an employee in travel status | Yes | |
| Rate-based parking paid by employee at a secondary work location | Yes | Must define primary work location |
| Prepaid parking or meter keys not purchased directly from the University | No | |
| Prepaid university parking permits or meter keys | Yes | For organizational unit use related to secondary work location parking incurred by employees or for official visitors where there is a contractual obligation. Organizational unit must maintain logs (or equivalent thereof) to demonstrate use. |

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|--|--------------|--|
| Passports | | |
| (to include fees for passport photos, costs of birth/health/identity certificates, and charges for inoculations) | Yes | See conditions for Visas, Green Cards, and/or Immigration Fees for entry into U.S. and for Visas for exiting U.S., below |
| Political Expenses | | |
| (cash or in-kind contributions to campaigns involving the nomination, retention, or election of any person to any public office, or to urge voters to vote in favor of or against a ballot initiative) | No | |
| Recognition Expenses | | |
| Awards, rewards, and prizes | Yes | |
| Staff Appreciation Meals (where the approved meal is the award and no separate awards are being given) | Yes | |
| Recognition Events | Yes | For related Gifts see Flowers, Fruit Baskets, and Greeting Cards and Gifts or Tokens, above |
| Recruiting Costs for Prospective Employees/Students | Yes | Activities must be directly related to work position/field of study/reason for recruitment (exceptions may be authorized by the appropriate officer) For student athletes, athletic policies also apply Reimbursements for family member(s) of the recruit must be approved by the appropriate officer |
| Reimbursements | Yes | As restricted by |
| Retirement Parties | Yes | See Recognition Expenses, above |

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| Student Recruitment Host Per Diems | Yes | <p>\$30 per diem is allowed to student hosts to cover costs associated with official recruiting visits for potential students (no receipts required)</p> <p>Requires fully executed agreement between student host and organizational unit, detailing responsibilities/activity dates</p> <p>For student athletes, athletic policies also apply</p> |
| Tickets to events | | |
| Admission tickets to event, purchased by the University | Yes | |
| Complimentary tickets to university events (provided by the University) | Yes | <p>For tickets given as donor cultivation, solicitation, and stewardship, see those expenses, above – requires use of advancement/development funds (Fund 36)</p> |
| Tips | Yes | <p>For tips on meal service related to Official Functions, the maximum allowable amount is 20% of the final bill (including tax and, if relevant, delivery charge), if the final bill does not already include a tip. If the final bill includes a set amount (of any percentage) for gratuity, then no additional tip may be provided.</p> <p>For tips on ground service transportation and other items related to travel status, see PPS Travel ^[3]</p> |

| ITEM (GOODS/SERVICES) | ALLOWABILITY | CONDITIONS |
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| Training Expenses | | |
| Functions or activities that are directly related to university work tasks and their related costs, such as team - building exercises focused on the workplace, and supplies/materials | Yes | Training function must have a written agenda Subject matter/focus of activities must be directly related to work environment/work tasks |
| Non-work-related activities and their related costs, such as sporting league registrations/fees and team uniforms | No | |
| Uniforms and Work Clothes | | |
| (e.g., provided by campus police or facilities management office for use at work, or by organizational unit for use at a conference or other event | Yes | Reported as wages to the employee unless employee is required to wear the uniform while conducting official university business for the organizational unit, and the uniform is not suitable for everyday wear. Note: Uniforms resembling everyday wear will not be reported as wages if the individual value is less than \$75 or if the organizational unit prohibits the employee from wearing the uniform for personal use |
| Visas, Green Cards, and/or Immigration Fees for entry into U.S. | | |
| Fees for permits/documents as required by students, scholars, researchers, or employees in order to conduct necessary university study/work and where there is a direct employment requirement by the U.S. Department of Homeland Security to obtain the permit/document (to include fees for passport/visa photos, foreign country exit fees, costs of birth/health/identity certificates, charges for inoculation/medical test...not to include ancillary costs such as charge for doctor's office visit) | Yes | All documents must be approved by the campus international student and scholar services office |

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| Fees for permits/documents required for immediate family members of students, scholars, researchers, or employees | | Must be approved by the appropriate officer All documents must be approved by the campus international student and scholar services office. |
| Visas for exiting U.S. | | . |
| Includes fees for visa photos, costs of birth/health/identity certificates, and charges for inoculation/medical test) | Yes | Ancillary costs included only if required as a condition of passport, visa, and/or sponsored research and such examination could not be obtained at a university facility. Transportation costs to passport/visa-issuing office included only if employee traveler's presence at that office is required and the office is outside employee's primary work location area |

Groups audience:

Controller

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Links

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