

Controllers' Meeting Agendas ^[1]

The Campus Controllers and University Controller meet monthly, September through June. Questions on discussion points from any meeting should be directed to the appropriate [campus controller](#) ^[2].

Controllers' Meeting Agenda: May 19, 2025

Campus Updates
GLBA Compliance Update
Concur Receipts Reviewed Reporting Deliverable
UCCS Proc Card Audit: Ineffective Report Review by AOs
Account Distributions on Itemtypes
Tuition Discounting
Foreign Contribution Reporting for June RAC meeting

Controllers' Meeting Agenda: April 21, 2025

Campus Updates
APS 7010 Red Flag Identity Theft Prevention
Tariffs
Official Function Updates in Concur
Fiscal Year 2025 Update

Controllers' Meeting Agenda: March 17, 2025

Campus Updates
IT Gov. Procurement Phase IV
Official Function Threshold
Exceptions to Finance Procedures: University and Campus Controller Review/Approval
Internal Audit Findings on Executive Expenses

Controllers' Meeting Agenda: February 18, 2025

Campus Updates
Financial Policy Review and Redesign Initiative-POI Involvement in Procurement, Conclusion
OnBase

Signatory Directives
A/R Collections

Controllers' Meeting Agenda: January 21, 2025

Campus Updates
AO Expense Report Review
PUM and ODOI
Concur Travel Allowance Update
Financial Policy Review and Redesign Initiative-POI Involvement in Commercial Card Program

Controllers' Meeting Agenda: December 16, 2024

Campus Updates
Cloud Discussion
Amazon Launch Update
Gift Fund Utilization
Official Function Per-Person Limit
Financial Policy Review and Redesign Initiative-Focus on POIs

Controllers' Meeting Agenda: November 18, 2024

Campus Updates
PIE
GLBA Contract Clause and QI
Amazon Launch
Concur Travel Allowance Update (early 2025)
Update on PV Form Access
Financial Policy Review and Redesign Initiative-Teams and Timelines
Adding Expense Account Code 487618 (Open Access Publishing Charges) to Concur
GASB 101 Compensated Absences
Tuition Discounting

Controllers' Meeting Agenda: October 21, 2024

Campus Updates
PSC Project Updates
Lyft Tax Exemption Process
Procurement Card Audit
OnBase Staffing
PIE
Asset Capitalization Threshold
Audit Update & Feedback

Controllers' Meeting Agenda: September 16, 2024

Campus Updates
GDS (Global Distribution System) Update in Concur
OnBase
m-Fin Reporting Check-in
Overpayment Process
Tuition Discounting Accounting Changes

Controllers' Meeting Agenda: June 17, 2024

Campus Updates
Discuss APS 4024 Travel Authorization
CUF General Touch Point – Year-End
Update on GDS Change in Concur Travel

Controllers' Meeting Agenda: May 20, 2024

Campus Updates
Third-Party Independent Contractor Platforms
GASB 101 Compensated Absences
Tuition Discounting Accounting Changes

Controllers' Meeting Agenda: April 15, 2024

Campus Updates
IT Auctions
Barthwell Supplier Diversity Assessment
Micro-Purchase Threshold
Capital Assets & the New Requisition Forms
Updates to Procedure Guidance in the Study Subject Payment Policymys
Campus/CU Remote Work Policies
New OUC Forms Website and Forms Project (continued)
New Concur Categories

Controllers' Meeting Agenda: March 18, 2024

Campus Updates
Worldspan to TravelPort +
Declining Balance POs
Requisition Redesign/Controller Sign-Off Form
PSC Virtual Office hours

Micro-Purchase Threshold
Fisher Scientific Strategic Agreement
GLBA Updates
New OUC Forms Website and Forms Project

Controllers' Meeting Agenda: February 20, 2024

Campus Updates
Close Dates for FY2024
PSC Travel Update
GLBA Compliance Letter
Accounting for and Reporting Financial Aid as a Discount
Cognos Upgrade and PUM

Controllers' Meeting Agenda: January 16, 2024

Campus Updates
Commercial Card Closures and Credit Reductions
Quick Reference Card Update
Auxiliary Types
FIN PUM Update and Cognos Upgrade from Version 11 to 12
Fund Transfer Table on OUC Website
GLBA Status
Status of Reclassifying Certain Restricted Designated as Restricted Expendable that should be Unrestricted

Controllers' Meeting Agenda: December 12, 2023

Campus Updates
Disclosure of Interests
Official Function Approval Requirements
Recognition & Training Proposed Modifications
Campus GLBA Status Update
FY 2023 Audit

Controllers' Meeting Agenda: November 14, 2023

Campus Updates
Pay in Arrears
Travel Cards for Type 15 POIs
Negative Auxiliary Enterprise Net Position Classification
GL Coding Related to RE to U Reclass
Officer Disclosure of Interest

Controllers' Meeting Agenda: October 16, 2023

Campus Updates
BEX Reimbursement
GLBA
Procurement's Third-Party Resources
Changes to YE Calendar due to extra vacation day
Coming Changes to the Commercial Card Application Process
Update on CUF's GL Transition
Non-Research Related Restricted Funds (Grants)
Gift Card Authorization Request (GC) Form-OnBase Development Update

Controllers' Meeting Agenda: September 18, 2023

Campus Updates
Solicitation Advertisements
Costco Membership
BEX
Use of Airbnb
Hybrid work and guidance on travel/expenses
Introduce New Treasurer
Unclaimed Property Update
Claim on Cash Training
Tender Refunding
GLBA
Tuition Discounting

Controllers' Meeting Agenda: June 13, 2023

- Campus Updates
- IT Procurement, Performance Measurement Reporting, Supplier Website, and Knowledge Base
- Special Provisions
- Procurement's Third-Party Resources
- Changes to YE Calendar due to extra vacation day
- Coming Changes to the Commercial Card Application Process
- Update on CUF's GL Transition
- Non-Research Related Restricted Funds (Grants)
- Gift Card Authorization Request (GC) Form-OnBase Development Update

Controllers' Meeting Agenda: May 15, 2023

- Campus Updates

- Data Governance
- CU Foundation System Conversion to CU Ascend
- ePERS Approvals
- Travel for Students Representing CU
- Accounts Flagged AP/PO Allowable in Marketplace

Controllers' Meeting Agenda: April 17, 2023

- Campus Updates
- Quick Reference
- Gift Card Authorization Request (GC) Form: OnBase form, testing, go-live plans
- Recognition & Training Procedures-Run through proposed modifications
- Official Functions: Approval requirements
- Cash Control Procedures: Run through proposed modifications

Controllers' Meeting Agenda: March 20, 2023

- Campus Updates
- Proposed used of ARPA funds
- Response to DOE letter received by CU
- Accounting Handbook – Cash Control Procedures Review
- Accounting Handbook – Sponsorships Procedures Review
- News from UIS
- Fiscal Year-End Calendar
- Recognition & Training Procedures – Revision

Controllers' Meeting Agenda: February 21, 2023

- Campus Updates
- Banking Services Contract
- Procurement Controller Approvals
- Tip Tolerance
- Business Expense Substantiation & Tax Implications status updates
- Potential Energy Tax Credits
- Account Code for Data Sharing

Controllers' Meeting Agenda: January 17, 2023

- Campus Updates
- PSC – Thresholds for Services
- APS 2005 Contracting Authority-under review
- Business Expense Substantiation & Tax Implications: revised procedures status update
- Gift Card Authorization Request (GC) Form- OnBase update
- Petty Cash for Student Needs

- 117 Audit Recommendations
- GASB 94
- GASB 96
- Encumbrance Topic for Multi-Year Runs

Controllers' Meeting Agenda: December 13, 2022

- Campus Updates
- New Bid Thresholds
- FAMLI Accounting Codes
- APS 4012 Fiscal Misconduct Reporting
- APS 1024 Sabbaticals
- Tuition Discounting for Public Institutions
- OnBase Forms and Fiscal Year End Calendar
- Disaster Recovery Plan Update Process
- m-Fin Available Balance for Clinical Trials and Program Income

Controllers' Meeting Agenda: November 15, 2022

- Campus Updates
- Bid Thresholds
- Business Expense Substantiation Revised Procedures: Follow-up
- Accounting Handbook Sponsorships Procedures-Review
- Tax Offset

Controllers' Meeting Agenda: October 17, 2022

- Campus Updates
- Employee Business Expense Reporting
- VAT Reclaim Discussion
- Changes to Special Provisions
- Excel Training
- HLC Reporting
- Official Functions

Controllers' Meeting Agenda: September 19, 2022

- Campus Updates
- Meet and Greet: Cristal Swain-PSC
- IT Procurement Terms & Conditions Update
- Sensitive Expense
- Official Functions Policy/Recognition
- Procurement Thresholds and Sponsored Research
- Bitcoin

- Information Security APS 6005 Update
- Higher Learning Commission
- GASB 96-SBITA
- CU Foundation Introductions: Charlene Laus, Liz Sayer

Controllers' Meeting Agenda: June 20, 2022

- Campus Updates
- \$85 Threshold per Person Policy
- HLC Ratios
- Remote Employee Travel/Expenses
- Fair Wage Fee
- Dependent Care Expenses

Controllers' Meeting Agenda: May 16, 2022

- Campus Updates
- Custodial Endowments
- PSC Updates
- Concur Modules
- Remote Employee Travel/Expenses
- Fiscal Cert Populations Due May 24

Controllers' Meeting Agenda: April 18, 2022

- Campus Updates
- Campus Updates on GASB 87 Implementation
- GASB 96
- State Exhibits

Controllers' Meeting Agenda: March 21, 2022

- Campus Updates
- Clean-up of Concur Expense Types and Mapping to GL Account Codes
- Regent Foreign Gift Reporting
- GASB 87 Status
- Documentation for Security Audit Finding
- Campus/OUC Initiative Alignment
- Confirmation of Two APS Changes
- Official Function Form

Controllers' Meeting Agenda: February 21, 2022

- Campus Updates
- Ship-To Address in Marketplace
- GASB 87-Leases Update

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Links

[1] <https://www.cu.edu/controller/news/office-university-controller-news/controllers%E2%80%99-meeting-agendas> [2] <https://www.cu.edu/controller/campus-controllers-finance-offices>