

## **Controllers' Meeting Agendas** <sup>[1]</sup>

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](#) <sup>[2]</sup>.

### **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

---

**Source URL:**<https://www.cu.edu/controller/news/office-university-controller-news/controllers%E2%80%99-meeting-agendas>

**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>