Sensitive Expenses and Official Functions FAQs

Do thank-you or blank cards fall under greeting cards?

Yes.

Are greeting cards still unallowable for departing/resigning employees?

For retiring employees, a greeting card is considered as part of the retirement gift they receive from their department. For employees who are simply leaving the unit or the university, i.e. moving to another state, a greeting card is not allowable with university funds. This is a "pass-the-hat" situation.

If we want to send a "thank you" greeting card to a department donor, do we need to get an officer's approval to buy the "thank you" greeting card?

New! Boulder inquired about this and Advancement OK'd it. You can now purchase with *either* Fund 36 *or* with Fund 34 that's allowable for entertainment, donor cultivation, or personnel recruitment. In other words, Advancement says it's OK to use Fund 34 with Gift Attribute Y as well as to use Fund 36.

Can a department pay for a "thank you" gift card with a Fund 10 or even a gift fund speedtype?

Gift cards are cash-like items and fall under the PSC Procedural Statement: Recognition and Training and the PSC Procedural Statement: Gift Cards. Gift cards can be used as a form of employee appreciation. If you are purchasing more than one or two gift cards you will need an approved gift card program. The department must also have an approved employee recognition program in place prior to giving gift cards as employee appreciation. The four recognition categories are: length of service, merit, safety or participation. It is acceptable to use a Fund 10 or a gift fund.

Is an officer typically defined as the chair of a department and director of an institute? Or is it the college dean/RIO vice-chancellor? Where can we go to find out who our officer is?

As per the Administrative Policy Statement: Fiscal Roles and Responsibilities: Officers are the president, chancellors, vice presidents, the university secretary, the university treasurer, associate and assistant vice presidents, vice chancellors, associate vice chancellors and deans. They are not chairs or directors of institutes.

You can find who the officer role is in your department by using PeopleSoft ChartField values. Choose the 'Chartfield/SpeedType Setup' tile, then choose ChartField Values>Organization, put in the organization number, click 'search', and then choose 'CU Department'. This will give you information for the department and will tell you who is the officer.

I believe we're not allowed to host official functions with employees from the same unit (separate from employee appreciation meals). However, we can host multi-unit official functions. Is there a minimum number of employees required to qualify for a multi-unit event?

Single unit meetings are allowable; however, you need to get written (emailed) pre-approval for the meeting from your vice chancellor. For a multi-campus or multi-unit event you would need at least one individual from each unit and if the meeting(s) is more frequent than once per month, vice chancellor approval is also required.

Should food for conferences, if not an official function, go under the conference's account code?

Yes, these should go under the 550200-Conferences account code.

Student functions include graduate student recruitment, correct? This would not be a recruitment function?

No, this is a recruitment function. As per the PSC Procedural Statement: Sensitive Expenses, recruiting costs for prospective employees or students are allowable. 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.

What is the difference between the student function account code and the official function account code with the student function sub-type?

The difference is the actual 6-digit number. In Concur, an event is entered with expense type "official function" or "large official function" then event type "student functions" will land in account code 550100. An event entered with expense type "student function" will land in account code 550300.

This is an issue when alcohol is served. In this case, the report must be approved by the campus alcohol approver (the controller or delegate.) The student function account code will not route the report correctly for that approval. Any time you have alcohol at an official function, you must choose the expense type "official function with alcohol" or "large official function with alcohol" for Concur to route your report correctly.

Is there documentation about what the difference is between a student event vs an official function student event?

No, the only difference is what 6-digit account number the charge will land in.

Where would food for a student event go? We have been calling it a student function.

This is fine. You could also call it an official function, event type student function. It depends on what account you want the charge to hit.

When would the Official Function form need to be approved in advance of an event? Often, the receipts/expenses are submitted via Concur after the event has occurred.

The paper Official Function form is required **unless** the expense will be reconciled in the Concur expense system (paid with the procurement card, travel card or with a personal card for reimbursement). Concur will automatically route these expenses to the campus alcohol approver, therefore, advance approval is not required.

For our colloquium, students take the speaker to lunch and faculty take the speaker to dinner. Is the lunch a student function or an official function?

Student functions are official functions. Per policy, student functions are those that are hosted for students, and directly related to student/educational development (e.g., student recognition, student recruitment, and student program development). This type of lunch would fall under the umbrella of official functions. Concur is admittedly a little unclear in relation to student functions and official functions and which one to pick, which we are discussing with folks at Systems.

I believe food is required when holding an official function with alcohol. I am wondering if there is a definition of how much food is required.

As per the [CU Boulder Events Planning and Catering department](#) FAQ's, food and non-alcoholic beverages must be served at any event with alcohol.

We have a donor-sponsored event that includes donor intent that spouses attend a dinner with faculty for this event. It is a lecture series with gift funds to pay for an official function. How is this handled?

Once money is received by CU those funds are subject to all restrictions within our existing policies and procedures. A donor cannot direct us to spend the donated money in ways that violate our policies and procedures. For example: a donor stipulated that their donation is to be used so that all faculty can fly first class to all conferences. First class travel is not allowable as per CU travel policy; therefore, we cannot use the donated funds for that purpose.

What is the correct process to follow when a cardholder over tips on an official function?

The amount of the over-tip may need to be reimbursed to CU. The employee will be notified if this is the case.

Do you have information regarding the Campus Approved Event Management form? Is this something that needs to be in place for all events or just in case?

This is not managed by the Campus Controllers Office. Please contact [Events Planning and Catering](#) for more information.

Is there a description somewhere of what is/is not allowable, who needs to be invited, and what is required for employee appreciation meals?

Staff appreciation meals are described in the PSC Procedural Statement: Recognition & Training, section E.

One example that came up in a department recently is for an end-of-semester meal for teaching assistants (TAs). I feel like this is where I have the most questions because they can be considered employees or students.

For people who could be either students or employees, you evaluate the circumstance in relation to the role they are fulfilling. If you have students that graduate and want to take them out to lunch to celebrate their graduation, that isn't employee appreciation because they weren't acting as employees but as students. If there is mandatory training for everyone in the department, including TAs, you wouldn't call that a student function because they are acting as employees.

Can you talk a bit about trainings, particularly about the difference between professional development and training to do your job?

As per the PSC Procedural Statement: Recognition and Training, section G.1: Employee training must provide a benefit to the university and cannot be solely for the personal, professional development or advancement of the employee. In other words, the training must result in the enhancement or advancement of the employee in relation to her or his university job performance and career.

Often, an end of semester meal is held for the purposes to go over what went well and what needs to be improved or vice versa at the beginning of the semester to go over what is expected for the semester (usually for labs). Would these meals be considered an appreciation meal since they're not really training? Or is it not allowable at all?

These are not appreciation meals because they don't fit the description. "A staff appreciation meal is an infrequent, unique, official function that is hosted and attended by the head of an organizational unit for the purpose of showing appreciation to a continuing or departing staff member or a group of staff members." These are allowable as single-unit meetings if the appropriate vice chancellor has given approval.