

ACADEMIC ENRICHMENT FUNDS: Faculty Use Policy

Academic Enrichment Funds (AEF): The Division provides an annual AEF Fund distribution to individual clinical faculty (faculty with more than 50% clinical time). The annual amount is determined by the overall financial status of the Division based on the previous fiscal year. This amount is only able to be used within the fiscal year and does not carry over. Expenses that go over the annual amount will be the responsibility of the individual faculty.

IMPORTANT CONTACTS: Please add your corresponding admin as a delegate in Concur:

1. *Tonya Lacy* TONYA.LACY@CUANSCHUTZ.EDU – Interventional Cardiology, Electrophysiology, ACHD
2. *Matraca Coleman* MATRACA.COLEMAN@CUANSCHUTZ.EDU – General Cardiology, Heart Failure & Research Faculty

Expenses eligible for AEF: The AEF is intended for academic enrichment, not personal expenses

- Examples of expenses to be **covered** by AEF:
 - Independent research.
 - Conference attendance: Registration fees, airline flight, hotel, meal per diem.
 - Meeting Registration and abstract submission: Please get in touch with your corresponding delegate for these to be purchased via a procurement card.
 - We encourage you to use per diem for food and drink (obviously exclude meals included as part of the conference).
 - Membership dues and subscriptions.
 - Colorado licensure renewal.
 - Training programs for credentialing.
- Examples of expenses to be **NOT** covered by AEF:
 - Cell phones and cell carrier fees.
 - Medical equipment.
 - Equipment that is provided at work (e.g. personal fax and copy machines).
 - A second computer.
- Note: DEA renewal fees are waived for our faculty, so should not need to be reimbursed.

Tax Exemption

The University is a tax-exempt organization. Purchases for University business should be made, when possible, using a Program Assistant Procurement Card to avoid paying sales tax and support the University's strategic sourcing initiatives. Reimbursements, unfortunately, cannot include sales tax.

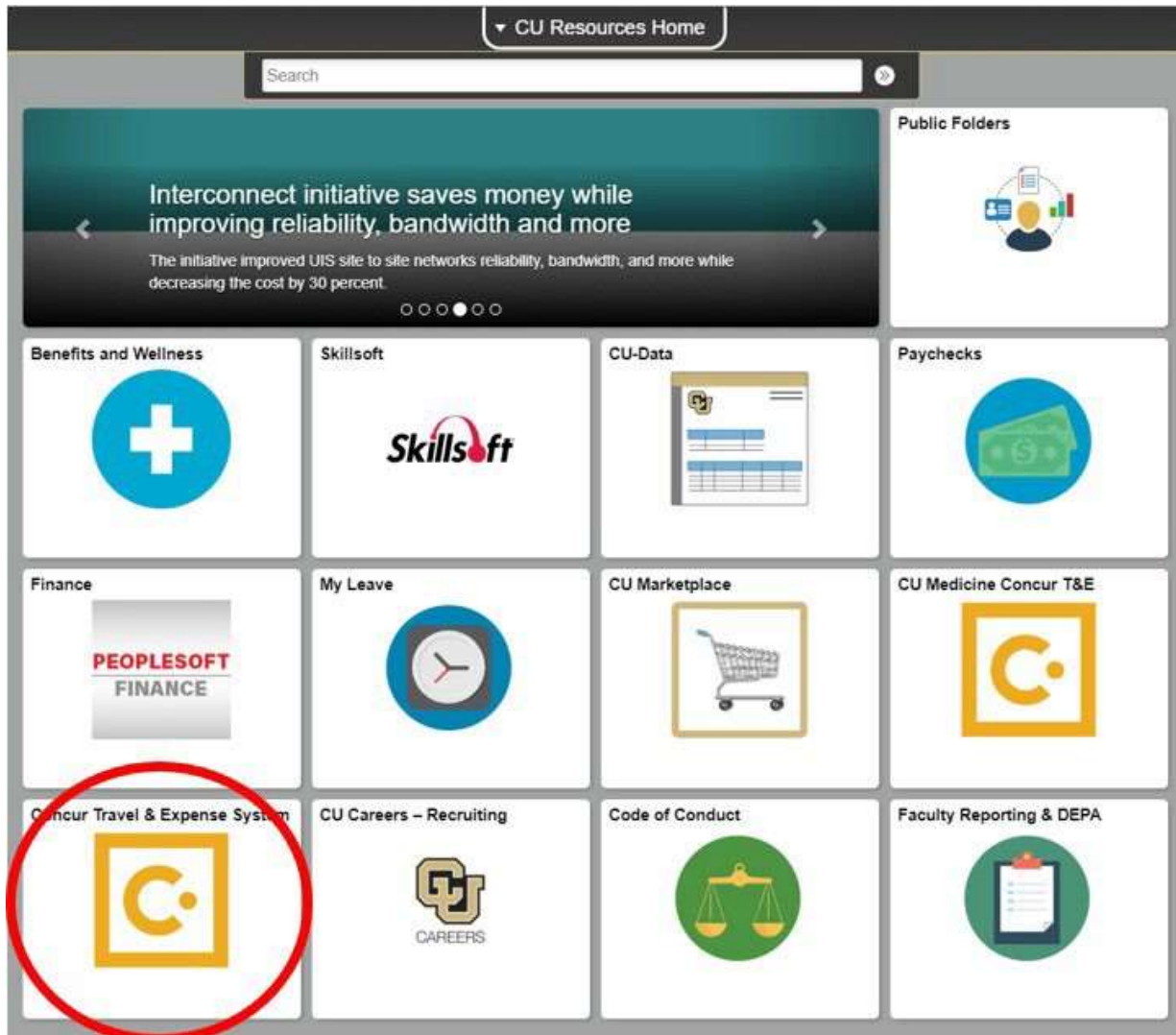
Contacts: Please add your corresponding assistant as a delegate in Concur (at <https://my.cu.edu/>)

- Tonya Lacy TONYA.LACY@CUANSCHUTZ.EDU - Interventional Cardiology and Electrophysiology
- Matraca Coleman MATRACA.COLEMAN@CUANSCHUTZ.EDU – General Cardiology, Heart Failure & Research Faculty

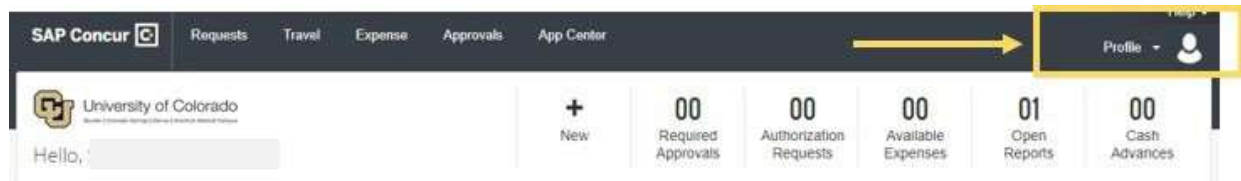
Substantiation and Reconciliation

All requests for reimbursement must be submitted directly to Concur or to your delegate via email. Adequate information must be submitted to enable the Division to identify the specific nature of each expense. Non-food related receipts should be scanned and uploaded to Concur or emailed as a PDF to your corresponding delegate within 30 days of payment. Receipts are not required for food or meals. Food and meals are reimbursed at a set per diem rate based upon which state you are travelling to. Per diem rates are calculated via Concur and can be found [here](#). One-time, non-food related expenses <=\$10.00 should be bundled with other reimbursements. Transactions that are determined to be of personal use or personal benefit will not be reimbursed.

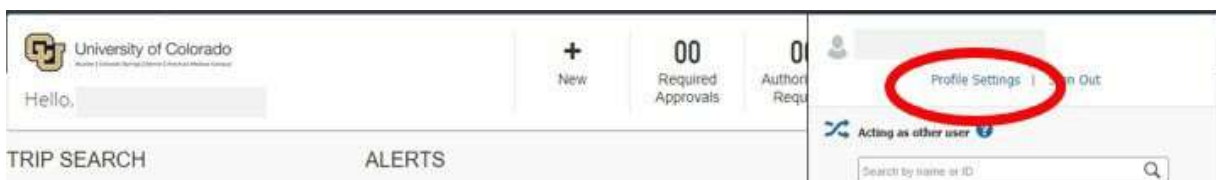
1. Log into my.cu.edu
2. Go to UCDAccess
3. Select Concur Travel & Expense System:



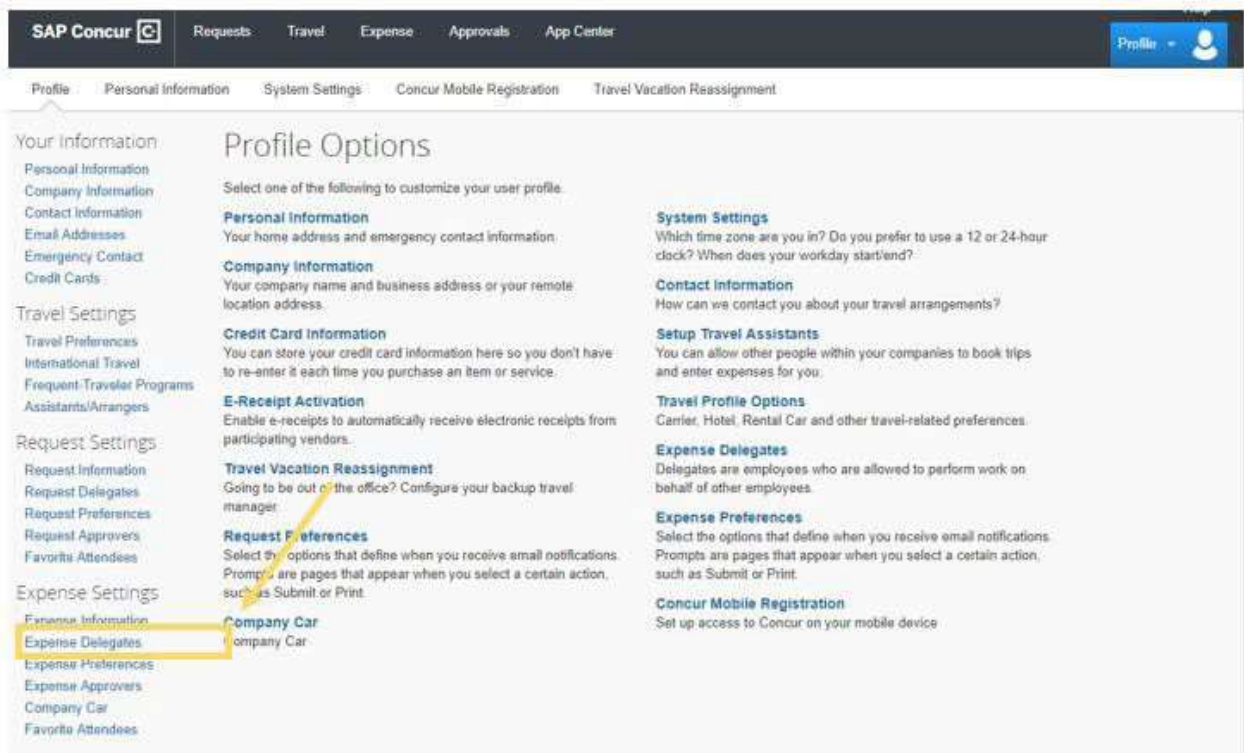
4. In the upper right-hand corner of Concur click on the Profile dropdown menu:



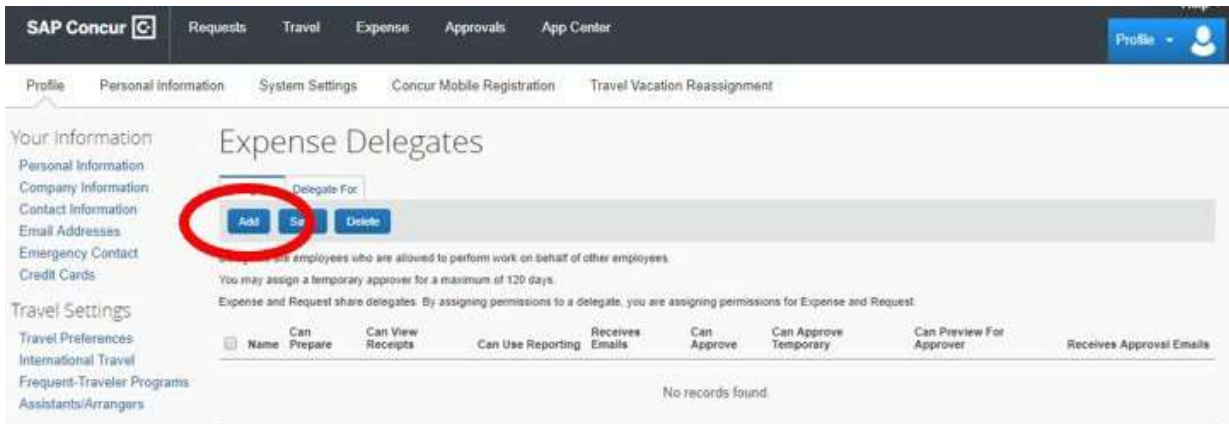
5. Select Profile Settings:



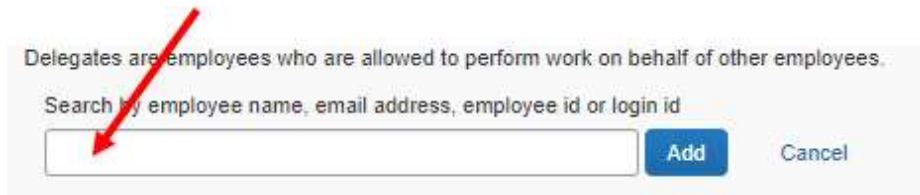
6. Toward the bottom of the left-hand column, select Expense Delegates:



7. On the screen that loads for Expense delegates, select the blue Add button:



8. Begin typing the email dress of the delegate you would like to assign into the fillable field, and select from the dropdown menu that appears:



9. When the expense delegate line appears, be sure to check the relevant boxes illustrated below:


Expense Delegates

Delegates Delegate For

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.
You may assign a temporary approver for a maximum of 120 days.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

Name	Can Prepare	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



10. When the appropriate permissions are selected, make sure to click Save:

Expense Delegates

Delegates Delegate For

[Add](#) [Save](#) [Delete](#)

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