

Procedure for Processing Delegation of Authority for Event Orders Approvers (EOAs)

The role of an Event Order Approver (EOA) is to ensure that meal, refreshment, and other entertainment related expenses are appropriate, that they meet the criteria described in the policies, and to advise Event Host, Event Expense Certifier, and Event Budget Approver on policy-related issues.

An EOA is NOT authorized to approve the actual entertainment expense. That approval must be given by an Event Expense Certifier (EEC).

Maximum \$ limits for EOA authorizations:

- [L1] \$100,000 for AVC - BFM.
- [L2] \$15,000 for Directors - BFM and existing EOA Directors.
- [L3] \$5,000 for Financial Analysts - BFM and existing EOA Analysts.

APPLICATION PROCEDURE

1. Your supervisor requests you to take on the role of an EOA.
2. Review the Entertainment Guide and complete the Entertainment Certification Quiz:
 - a. Entertainment Guide: https://financial.ucsc.edu/Pages/Entertainment_EventExpenseGuide.aspx
 - b. Entertainment Certification Quiz: https://financial.ucsc.edu/Pages/Entertainment_quiz_EEC.aspx
3. With your CruzID Gold login, sign in to the “Entertainment Delegation of Authority” form at: https://financial.ucsc.edu/_layouts/FormServer.aspx?XsnLocation=/Delegation_Authority/Forms/template.xsn&OpenIn=browser
 - a. The “Entertainment Order Approver (EOA) Special Designation Request” is no longer required for professional-level employees with a PPS grade of "J" or lower.
4. Complete, submit via the website, and sign a copy of the “Entertainment Delegation of Authority”.
5. Obtain approval from your Associate Vice Chancellor on the printed “Entertainment Delegation of Authority” form.
 - a. NOTE: If this Delegation of Authority request is over \$5,000, approval from Vice Chancellor - DSAS is also required. After you obtain approval from your Associate Vice Chancellor, please forward your completed form to BFM at dsasfinancial@ucsc.edu. BFM will forward the form to the Vice Chancellor - DSAS for approval.

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APPLICATION PROCEDURE CONTINUED...

6. Once approved, send the completed forms to Financial Accounting and Reporting (FAR) – finpolicy@ucsc.edu and Budget & Financial Management - dsasfinancial@ucsc.edu.
7. Complete CruzBuy application: https://financial.ucsc.edu/Pages/WF_CruzBuy_Account_Auth.aspx
 - a. The requested Food & Entertainment approval limit and org codes MUST match the “Entertainment Delegation of Authority” form authorization.

RESOURCES:

Financial Affairs Entertainment website: https://financial.ucsc.edu/Pages/Entertainment_Process.aspx

Financial Affairs Entertainment Guide: https://financial.ucsc.edu/Pages/Entertainment_EventExpenseGuide.aspx

Entertainment Certification Quiz: https://financial.ucsc.edu/Pages/Entertainment_quiz_EEC.aspx

Financial Affairs Form Directory: https://financial.ucsc.edu/Pages/Forms_Directory.aspx

Entertainment Delegation of Authority List: https://financial.ucsc.edu/Pages/Entertainment_DO