

Procedure for Processing Delegation of Authority for Event Expense Certifiers (EECs)

The role of an Event Expense Certifier (EEC) is to review and certify that meal and refreshment expenses provided at an event or meeting are valid and appropriate and to approve the use of an appropriate fund source. An EEC Delegation of Authority Form is required for any staff to be approved as an Event Expense Certifier. An EEC Delegation of Authority Form must be approved by:

Level Designation	Position	Maximum \$ Limits		Delegation of Authority Approvers (route through your Financial Analyst)
		Standard-Level	Top-Level	
L1	Vice Chancellor & Delegate	\$250,000	\$250,000	
L2	Associate & Assistant Vice Chancellors	\$20,000 Staff Entertainment & Student Programming	\$1,000*	Vice Chancellor - DSAS
L3	Unit Directors / Leaders Executive Director, Housing Services; Director, DRC; Senior Directors, CSL	\$10,000 Staff Entertainment & Student Programming	None	Vice Chancellor - DSAS and AVCs
L4	Department Directors / Leaders Director, Housing Facilities; Associate Director, Career Engagement	\$5,000 Staff Entertainment & Student Programming	None	Vice Chancellor - DSAS or AVCs
L5	Assistant Directors Manager, Marketing & Communications	\$1,000 Staff Entertainment & Student Programming	None	Vice Chancellor - DSAS or AVCs,
L6	Supervisors & Coordinators CREs, ARCH; SBM Supervisor, Facilities; STEM HUB Coordinator	\$500 Staff Entertainment & Student Programming	None	Vice Chancellor - DSAS, AVCs, Unit & Department Directors

*Top level approval is required for entertainment expenses that exceed the per person spending limit, for employee morale building events such as a retirement event or a holiday gathering, an event in which a spouse, partner, or family member of the host or a guest attend, events for which tickets to a sporting, theatrical, or cultural event are included, and for events during which alcohol is served.

Note: Ticket or gift purchases are restricted expenses requiring top level approval.

APPLICATION PROCEDURE

1. Your supervisor requests you to take on the role of an EEC.
2. Contact your Financial Analyst for unit, department, or college specific information.
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
4. Complete, submit via the website, and sign a copy of the “Entertainment Delegation of Authority” form.
5. Obtain approval from the appropriate Delegation of Authority Approver in table listed on Page 1 (route through your Financial Analyst).
 - 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 the appropriate Delegation of Authority Approver in table listed on Page 1, please forward your completed form to BFM at dsasfinancial@ucsc.edu. BFM will forward the form to the Vice Chancellor - DSAS for approval.
6. Once approved, send the completed forms to Financial Accounting and Reporting (FAR) – finpolicy@ucsc.edu and BFM - 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 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

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

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