Summary of Forms and Approval Requirements for Food & Entertainment

Ent. Ref. 1.1

Method of Purchase:

- **CruzBuy Purchase Order**
  - Multiple F&E Orders made through CruzBuy: use 1st requisition # for Tracking
- **CTE Card**
  - Attach receipts and backup documentations in CruzFly
- **Pro-Card**
  - Complete Entertainment Reporting Addendum (ERA)
- **Dining Recharge or Reimbursement**
  - Complete Entertainment Reporting Form (ERF)

Expense Tracking Tools For Paying with Multiple Methods:

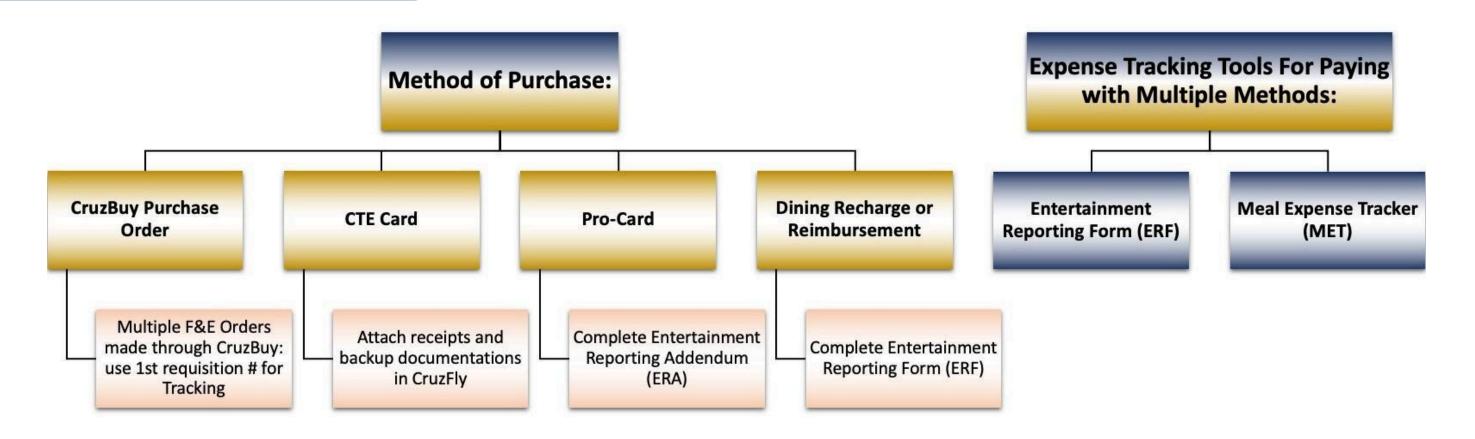- **Entertainment Reporting Form (ERF)**
- **Meal Expense Tracker (MET)**

➔ ERF: https://financial.ucsc.edu/Pages/Dashboard.aspx#EntertainmentNew
➔ MET: https://financial.ucsc.edu/Pages/Dashboard.aspx#METNew

HOST CERTIFICATION	PARTICIPANT LIST	AGENDA	BULK PURCHASES	ALCOHOL
• *A host is required for Employee Morale, Entertainment (i.e., recruitment and alumni events), and Student outreach events:* o *The host cannot be the same person as the Event Expense Certifier (EEC);* o *Contact your Financial Analyst for more information.*	• A participant list is required for all entertainment events: o *For events under 25 people, include affiliation and title of all participants (Please note if there is any family members or non-staff attending);* o *For open-invitation and large scale (over 25 people) events, you may attach a flyer/announcement/ e-mail/Facebook page, in addition to a general description of attendees, including staff to attend.*	• An agenda is required for all Business Meetings and Staff Trainings (Account Code: 001270). • All other events require an explanation of the planned activities which will substantiate the business purpose of the event.	• Bulk purchases are limited to the amount that will be used within the fiscal year. • An inventory record for each quantity purchase (e.g. beverages, nonperishable food and supplies) must be maintained by the responsible department/unit. • *Contact your Financial Analyst for more information.*	• A UCSC-hosted event that includes the serving or consumption of alcoholic beverages regardless of where the event is held must include Top-Level approval. In Accordance with University Policy. • Campus Police must be notified when there are 50 or more invited participants.

EVENT EXPENSE APPROVERS (EECs) aka ENTERTAINMENT APPROVERS					
Up To:	**$500**	**$1,000**	**$5,000**	**$10,000**	**$20,000**
Acct Code: 001253 – Study Break/Orientation /Dances/Festivals/Student Org Events/Student Organization Group Meetings/Residential Floor Programs/FSH Culinary Culture Share/Commencement	**Level 6 EECs** and above	**Level 5 EECs** and above	**Level 4 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*	**Level 3 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*	**Level 2 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*
Acct Code: 001260 – Tickets/Entry Fees for Student Programming Events NOTE: Consult with your Financial Analyst when purchasing tickets **** Tickets are a restricted expense requiring top level approval from an EEC ****	**Level 5 EECs** and above				
Acct Code: 001270 – Business Meeting/All Staff Training	**Level 5 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*				
Acct Code: 001272 – Employee On-The-Job Meals (including Move-in/Move-out/Commencement)					
Acct Code: 001250 - Employee Morale (i.e., All Staff Appreciation/Retirement Celebration/Holiday Event)	****TOP LEVEL APPROVAL REQUIRED**** **Level 2 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*		****TOP LEVEL APPROVAL REQUIRED**** **Level 1 EECs** and above *(route through Financial Analyst using Ent Ref 1.3.1 or Ent Ref 1.3.2)*		