March 6, 2012

ALL STAFF
Undergraduate Education

Dear Staff,

Re: UE Entertainment Policy and Entertainment Request Form Procedures

The newly revised Undergraduate Education entertainment policy is now in effect. This policy is an addendum to campus and Office of the President food and entertainment policy and requires strict adherence. Please refer to link for full details: [https://ue.soe.ucsc.edu/ue_entertainment2012](https://ue.soe.ucsc.edu/ue_entertainment2012).

As a reminder when planning events, alcohol permits are no longer required by campus but the revised policy still requires senior officer approval for any event that includes alcohol. Policy also requires that an appendix A form be signed by anyone who sponsors (attends and monitors) an event that involves alcohol. A copy of appendix A should be kept at the unit’s office as well as transmitted to the VPDUE’s office so that we can confirm this piece of the process when approving an event. A new appendix A should be completed and filed quarterly.

With the rollout of the Entertainment Request Form (ERF), Undergraduate Education has developed the following process for submission and pre-approval of entertainment when using a purchase order for payment:

1. Event Host creates an ERF, providing event and expense information.
2. Cruz Buy Requester enters a requisition, citing the ERF number and attaching documentation.
3. Requester receives email from ERF system, noting whether using CruzBuy, and forwards to Assistant Vice Provost Jessica Fiske Bailey (jfbailey@ucsc.edu), who serves as UE’s Event Order Approver and Entertainment Expense Certifier. If top level approval is necessary, she will obtain this.
4. After the event, if there are no material changes, the ERF form, original receipts should be forwarded to UE for signature approval.
5. If the changes to the PO exceed $500 a CruzBuy change order must first be completed before forwarding the ERF, and documentation, to UE.
6. After approval, UE will then forward the ERF and documentation to Financial Accounting and Reporting (FAR).

Now entertainment recharges (including University Catering) and reimbursements will be processed through the ERF system. This system is still new and full of kinks, so please bear with us as we navigate this payment process as quickly and accurately as possible. Please feel free to contact entertainmenthelp@ucsc.edu with any questions or concerns.

Sincerely,

Richard Hughey
Vice Provost and Dean of
Undergraduate Education