Frequently Asked Budget & Funding Topics

1. **Gifts, Prizes, and Awards**
    a. Gifts: No cash gifts are permitted, regardless of funding source. No GPR funding may be used for any type of gift.
    b. Prizes: No GPR funds may be given out as cash.
    c. Awards: No University Funds may be given out as cash.
    d. Growth, Quality, and Access (GQA) funds should not be used for gifts, prizes, or awards.
    e. For further information please see:
        i. UWL Prizes, Awards and Gifts Policy: https://www.uwlax.edu/globalassets/offices-services/business-services/uwl-prizes-awards-and-gifts-policy.pdf
        ii. UW System FAP F46: https://www.wisconsin.edu/financial-administration/financial-administrative-policies procedures/fppp/f46-prizes-awards-and-gifts/

2. **Food Purchases**
    a. There must be a documented business purpose supporting the mission of the hosting department, regardless of funding source.
    b. University funds cannot be utilized for any social functions or social activities.
    c. UW-La Crosse has an exclusive contract for dining services with Chartwells. There is an option to self-cater, however the cost must be under $100 and can only include snacks and beverages. Specifically, no pizza is allowed. Any self-cater requests or requests to deviate from the contract must be approved by University Centers. The approval should then be sent to Business Services as supporting documentation for your request.
    d. For further information please see:
        i. UWL Food Purchases Policy: https://www.uwlax.edu/globalassets/offices-services/business-services/policies/food-purchases-policy-effective-12-19-16.pdf

3. **Professional Development**
    a. GPR funds cannot be used for supervisory training for classified employees who do not have responsibility for supervision over other classified employees. Leading the work of LTE's or Student Help do not qualify one for supervisory training opportunities.
    b. GPR funds are unable to pay for professional license fees for CPAs, CFAs, physicians, and attorneys.
    c. For further information please see UW System Operational Policy GEN 25: https://www.wisconsin.edu/personnelsystems/download/development_documents/ops/gen/UPS-OP-GEN-25-Payment-of-Licences.pdf

4. **Computers**
    a. New hires are not automatically granted a new computer. The ITS Computer Lifecycle Management policy reads as the:
        i. Reuse computer out of the non-legacy computer pool (computers that were brought back to ITS when Faculty/Staff exit the university). Adjunct (Non-Budgeted IAS) will be assigned a legacy computer (will not be replaced with a new computer).
        ii. Departments may request a computer for New Hires based on the Operating System (Windows or Mac) and Device Type (Laptop or Desktop). Computers will be assigned from the computer pool based on availability and on a first come first serve basis. Requests should be submitted online via support.uwlax.edu.
        iii. If it is determined with ITS that a new hire requires a computer that is not available in the non-legacy computer pool then the Department or Unit is responsible for the cost to purchase a new one (i.e. only PC Desktops available and they need/want a Mac laptop).

5. **Travel**
    a. All University funded airfare must be booked through the managed travel program, currently contracted with Fox World Travel.
    b. For further information please contact: Accounts Payable: http://www.uwlax.edu/accounts-payable/travel/

6. **Research Participant Payments**
    a. Please see UWL Payment of Incentives to Research Participants Policy and Procedures: https://www.uwlax.edu/globalassets/offices-services/business-services/uwl-bs-payment-of-incentives-to-research-participants-policy-2015-01.22.2016.pdf

7. **Growth, Quality, & Access:**
    a. For further information about GQA Budget and Expenditure Guidelines please see: http://www.uwlax.edu/Budget/GQA-Policy/

8. **Scholarships:** The use of GPR funds is not permitted.

9. **Deficit Accounts**
    a. Departmental accounts are required to be managed by individuals authorized for the account within the approved expenditure budget on a monthly and annual basis for each fiscal year.
    b. For further information please see: http://www.uwlax.edu/Budget/Deficit-Account-Policy/

10. **Start-up Guidelines**
    a. The Budget Office has a listing of guidelines that can be provided.
    b. No student help
    c. Itemization: Details of the start-up funds, since utilized as a negotiation tool, should be confirmed ahead of time and provided on the contract to ensure the appropriate funding is secured. A blanket statement about start-up funding will need further itemized detail to confirm funding, and ensure budget is loaded and spent in the appropriate lines.
    d. Repurpose: The original plans of the start-up funds cannot be repurposed without discussion and approval from the Budget Office. (Example, switching professional development travel to software.)
    e. Timeline: Start-up accounts are allowed to carryover for up to two fiscal years. (Example: if an employee starts in August of 2015(FY16), they have the remainder of FY16 and all of FY17 if needed. They do not have until August of 2017.)

11. **UWL Foundation Requisition Guidelines**:
    a. Gift funds held at the Foundation that departments will use in support of the university should be incorporated into the University's budgeting and accounting system by requesting the Foundation make a gift to the University. The Foundation disburses the gift to the University and it is deposited into a Fund 233 Gift Account. The use of these funds are governed by State of Wisconsin, University of Wisconsin System and university policies.
    b. For more information, please see: https://www.uwlax.edu/globalassets/offices-services/business-services/policies/uwl-foundation-requisition-guidelines.pdf
    c. UWL Business Services Gifts Funds Website: https://www.uwlax.edu/business-services/our-services/gift-funds/#tab-overview

12. **Overload and Lump Sum Payments**
    a. Paperwork must be completed prior to work beginning.

    b. Overload payment refers to additional non-recurring work or courses taken on by a UW-L faculty or staff outside of their regular work duties. Lump sum payment refers to payment for a short-term employee who is completing non-recurring duties on an as needed basis.

    c. For more information please see:

    d. UWL Policy on Overload Payments for Faculty, Instructional Academic Staff and Non-Instructional Academic Staff: https://www.uwlax.edu/globalassets/offices-services/human-resources/overloadpaymentsforfacultyacademicstaffpolicy.pdf

    e. Form & Instructions: http://www.uwlax.edu/Human-Resources/Overload-and-lump-sum-payments/

    f. Earning limits: https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/fppp/f29-rev-2-salary-and-fringe-benefits-calculations-for-unclassified-staff/

13. **Carryover Process**
    a. There is no carryover for fund 131 resources including: Growth, Quality, and Access(GQA), Provost Instructional Reserve(PIR), Excess Revenue(ER), or Academic Initiatives(AI) accounts. All accounts are zeroed out at fiscal year-end.
        i. Startup accounts are allowed and carried forward automatically for two fiscal years.
    b. Internal grants such as International Development Funds (IDF), Faculty Research, Faculty Development, Graduate Research, Undergraduate Research, etc. must be expended in the year the funds are awarded, unless approved by the Vice Chancellor of Administration and Finance.
    c. UW System grants must be expended within the proposed and awarded timeline of the grant, unless an extension is approved by UW System and documented to the UWL Budget Office.
    d. Carryover for fund 102 is determined by the University on an annual basis.

14. **Other Resources**
    a. Budget Office: http://www.uwlax.edu/budget/
    b. Business Services: http://www.uwlax.edu/business-services/
    c. Human Resources: http://www.uwlax.edu/human-resources/
    d. Purchasing: http://www.uwlax.edu/purchasing/

Notes:
GPR (General Purpose Revenue): 102, 104, 131, 402, 403, 406
PR (Program Revenue): 128, 132, 133, 136, 144, 150, 189, 233

Updated 8.25.2015