

UNIVERSITY
OF MIAMI



Last Update: 21 May 2012

Financial Operation Policies (Former Business Services)

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[Financial Operation Policies](#)

**Financial Operations Policies and Procedures
General Business Policies**

BSF 005 Contracts / Agreements

Policy last updated in November 2010

Purpose:

This policy identifies the persons at the University who are authorized to execute contracts and agreements. (Delegation of Contracting Approval and Signature Authority)

[BSF-005 CONTRACTS / AGREEMENTS](#)

BSF 010 Approval and Signature of Contracts

Policy last updated in November 2010

Purpose:

To provide guidance on contracts approval.

[BSF-010 APPROVAL & SIGNATURE OF CONTRACTS](#)

BSF 012 Hurricanes and Other Crisis Situations

Policy last updated in October 2003

Purpose:

This policy directs to the website used to handle emergency situations such as hurricanes, fires, bomb threats and other crisis situations.

[BSF-012 HURRICANES & OTHER CRISIS SITUATIONS](#)

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BSF 015 Legal Matters

Policy last updated in November 2010

Purpose:

This policy sets forth the method and identifies the persons authorized to handle legal matters on behalf of the University.

[BSF-015 LEGAL MATTERS](#)

BSF 020 Lost and Found Items

Policy last updated in November 2010

Purpose:

To establish a mechanism for reporting and recovering items lost on University premises.

DCIE: All lost and found items should be released to Paola Conte

[BSF-020 LOST AND FOUND ITEMS](#)

BSF 025 Organization Membership Fees

Policy last updated in November 2010

Purpose:

To provide information regarding the payment of fees for institutional membership and the individual membership of University personnel in various organizations.

[BSF-025 ORGANIZATION MEMBERSHIP FEES](#)

BSF 045 Use of University Facilities

Policy last updated in December 2010

Purpose:

This policy is designed to ensure consistency for the use and rental of each reservable facility at the University. The policy covers not only "academic" facilities which are used primarily for classroom, research and other curricular activities, but also athletic facilities and others which are not customarily used for activities relating to the formal curriculum of the University.

[BSF-045 USE OF UNIVERSITY FACILITIES](#)

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BSF 050 Use of University of Miami Name

Policy last updated in November 2010

Purpose:

To provide guidelines for University and non-University organizations or individuals on the use of the University of Miami marks or name.

[BSF-050 USE OF UNIVERSITY OF MIAMI NAME](#)

BSF 065 Record Retention and Legal Actions

Policy last updated in December 2010

Purpose:

This policy sets forth requirements for record retention upon the initiation of government or other entities investigations and/or lawsuits. For routine record retention see University policies on management, retention and disposition of University records.

[BSF-065 RECORD RETENTION AND LEGAL ACTIONS](#)

BSF 070 Student Loan Code of Code of Conduct

Policy last updated in December 2010

Purpose:

The University has formalized the guiding principles avoid any potential for a conflict of interest between the University and its students or their parents, in the student financial aid process.

[BSF-070 STUDENT LOAN CODE OF CONDUCT](#)

BSF 075 Soliciting

Policy last updated in November 2010

Purpose:

To identify prohibited and permissible solicitations on University premises, and to outline procedures for the request and approval of permissible solicitations.

[BSF-075 SOLICITING](#)

BSD 100 Management, Retention and Disposition of University Records

Policy last updated in August 2011

Purpose:

The purpose of this policy is to establish University requirements for securely storing, preserving the history of and destroying records in accordance with legal requirements. This Policy applies to all University personnel responsible for the maintenance of University Records, including personnel affiliated with third parties who have access to University Records. All

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University Records must be managed and governed according to the policy outlined in this document.

[BSF-100 MANAGEMENT, RETENTION AND DISPOSITION OF UNIVERSITY RECORDS](#)

Purchasing

BSJ-010 Change or Cancellation of an Order

Policy last updated in July 2011

Purpose:

To provide a procedure for the change or cancellation of a Purchase Order (PO).

[BSJ-010 Change Or Cancellation Of An Order](#)

BSJ-015 Competitive Bids Written and Verbal

Policy last updated in July 2011

Purpose:

To define when competitive bids are required by the Purchasing Department for the purchase of goods and services.

[BSJ-015 Competitive Bids. Written & Verbal](#)

BSJ-020 Computer and Telecommunication

Policy last updated in July 2011

Purpose:

To emphasize University policy with regard to propriety in the acquisition of computer goods and/or services.

[BSJ-020 Computer And Telecommunication](#)

BSJ-025 Conflict of Interest

Policy last updated in July 2011

Purpose:

To clarify a conflict of interest as it relates to University business matters.

[BSJ-025 Conflict Of Interest](#)

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BSJ-028 Contracting Requirements

Policy last updated in July 2011

Purpose:

To define the contracting requirements for E-commerce, Websites, Data Banks and consulting agreements to review billing practices.

[BSJ-028 Contracting Requirements](#)

BSJ-030 Consultant Services

Policy last updated in July 2011

Purpose:

To set forth the methods of procurement, payment and the determination of propriety for the engagement of consultant services.

[BSJ-030 Consultant Services](#)

BSJ-40 Demonstration or Trial of Equipment

Policy last updated in July 2011

Purpose:

Procedure to obtain equipment on a trial basis through a Purchase Requisition.

[BSJ-040 Demonstration Or Trial Of Equipment](#)

BSJ-050 Emergency Purchase Order

Policy last updated in July 2011

Purpose:

To provide a method for emergency purchases and to set forth the conditions under which such purchasing is approved.

[BSJ-050 Emergency Purchase Order](#)

BSJ-060 Establishing a Standing Purchase Order

Policy last updated in July 2011

Purpose:

To provide a vehicle for the purchase of ongoing services and/or maintenance.

[BSJ-060 Establishing A Standing Purchase Order](#)

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BSJ-075 Misrepresentation by a Vendor

Policy last updated in July 2011

Purpose:

Procedure to be followed in case of misrepresentation by a vendor.

[BSJ-075 Misrepresentation By A Vendor](#)

BSJ-115 Purchasing and Contracting Authority

Policy last updated in October 2011

Purpose:

This policy establishes University requirements for review and execution of purchase agreements and contracts.

[BSJ-115 Purchasing and Contracting Authority](#)

BSJ-120 Unauthorized Purchases

Policy last updated in August 2010

Purpose:

To provide examples of unauthorized purchases and inform the proper way of obtaining goods and services.

[BSJ-120 Unauthorized Purchases](#)

BSJ-130 Record Retention

Policy last updated in August 2010

Purpose:

To set forth the criteria, types of records and procedures for the retention of purchasing documents.

[BSJ-130 Record Retention](#)

BSJ-145 Sole Source Procurement

Policy last updated in July 2011

Purpose:

To provide criteria and procedures for non-competitive purchasing.

[BSJ-145 Sole Source Procurement](#)

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BSJ-175 Contract Requirements for Dedicated on-site Services

Policy last updated in September 2011

Purpose:

To define employment-related minimum standards required of defined service contractors or covered contractors doing business with the University on the University's campuses.

[BSJ-175 Contract Requirements for Dedicated on-site Service](#)

BSJ-180 Sustainable Procurement

Policy last updated in August 2011

Purpose:

To strive to purchase environmentally and socially responsible materials and products.

[BSJ-180 Sustainable Procurement](#)

BSJ-185 Cell Phones and PDAs

Policy last updated in October 2011

Purpose:

This policy sets forth the circumstances under which the University of Miami will provide a taxable cell phone allowance or a University-provided Personal Digital Assistant (PDA) to faculty and staff whose duties and responsibilities require them to maintain a cell phone or Personal Digital Assistant (PDA) for business use. The processes described in this document will be the only methods used to provide cell phone or PDA services. Other reimbursement methods are not permitted.

[BSJ-185 Cell Phones and PDA's](#)

Travel Management

D015 Travel and Business Expenses

Policy last updated in July 2008

Purpose:

To manage travel and business expenses through BERFs.

[D015 Travel and Business Expense](#)

[D015E Electronic Travel and Business Expenses](#)

General Travel Management Website:

[Travel Management](#)