REVISION HISTORY: ALL CHAPTERS

04/01/10 Section 205: Sales Tax
Revises St. Louis County tax rate

03/15/10 Table of Contents
Adds Section 1204 Information Technology and Telecommunications Purchases

03/15/10 Section 1204: Information Technology & Telecommunications Purchases
Creates policy for the purchase of IT and Telecom Purchases

03/01/10 Section 202: Disposition of Checks
Revises references and clarifies lost/incorrect check processing

03/01/01 Section 206: Petty Cash Funds
Revises references and request information needed

03/01/01 Section 214: Disbursements – Moving Expenses
Revises and links to current forms, clarifies moving expense limit

03/01/01 Section 215: Organizational Dues & Memberships
Revises to clarify when University funds may be used to pay for memberships

01/01/10 Section 214: Disbursements – Moving Expenses
Reduces moving mileage reimbursement to $0.135 per mile

01/01/10 Section 504: Methods of Transportation and Allowances
Reduces mileage reimbursement to $0.47 per mile

10/01/09 Section 205: Sales Tax
Revises Boone County tax rate (expired 1/5% county capital improvements sales tax)

08/01/09 Table of Contents
Changes Title of Section 903 from Scheduling University Records for Retention & Disposal to Records Retention Schedules

08/01/09 Section 903: Records Retention Schedules
Revises to reflect current state of record retention authorizations

08/01/09 Section 908: Document Imagery
Clarifies language for document imagery

08/01/09 Section 911: Electronic Records Administration
Updates electronic records language and links to definitions in BPM 902

07/17/09 Section 902: Records Management General Policy
Clarifies Records Management practices and revises to include current media types
REVISION HISTORY: ALL CHAPTERS

07/15/09  Section 901: Organization & Services
          Adds link to Records Management Website for microfilm information

07/15/09  Section 904: Storage of Inactive Records
          Adds information on storage boxes and labels

07/15/09  Section 905: Disposal of University Records
          Adds link to BPM for definitions of confidential records

07/15/09  Section 907: Vital Records
          Adds to list of designated records

07/01/09  Section 205: Sales Tax
          Revises UMSL County tax rate and provides more information about applicability of taxes

07/01/09  Section 701: General Policy (Reporting Accidents & Incidents)
          Clarifies reference information

07/01/09  Section 702: Loss of Money, Securities & Property
          Updates department names and clarifies loss reporting requirements

07/01/09  Section 703: Damage to University Property (Including Fire)
          Revises contract information and clarifies definitions

07/01/09  Section 704: Employee Injuries & Occupational Diseases
          Adds report form and non-employee information

07/01/09  Section 705: Accidents – University Vehicles
          Revises forms to be used and corrects reference to another BPM section

07/01/09  Section 706: Accidents – Rented Vehicles
          Adds reporting information when an employee is injured

07/01/09  Section 707: Students & General Public (Except Vehicle Accidents)
          Corrects reference to other BPM section

07/01/09  Section 708: Incidents – Medical Patients (Therapeutic & Diagnostic)
          Revises form to be used and corrects language

07/01/09  Section 709: Incidents – Medical Patients (Not Therapeutic & Diagnostic)
          Revises form to be used and addresses subpoenas or requests for records

07/01/09  Section 710: Wrongful Act Incidents
          Adds reference to other BPM section
<table>
<thead>
<tr>
<th>Date</th>
<th>Section/Title</th>
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<tbody>
<tr>
<td>07/01/09</td>
<td>Section 711: Broadcasters’ &amp; Publishers’ Incidents</td>
</tr>
<tr>
<td></td>
<td>Provides expanded list of types of incidents and includes requirements to</td>
</tr>
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<td></td>
<td>submit reports to General Counsel’s Office</td>
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<tr>
<td>07/01/09</td>
<td>Section 802: Purchasing Insurance</td>
</tr>
<tr>
<td></td>
<td>Adds methods of purchase</td>
</tr>
<tr>
<td>07/01/09</td>
<td>Section 803: Insurance Coverage</td>
</tr>
<tr>
<td></td>
<td>Links to Risk &amp; Insurance Management website list of insurance coverages and</td>
</tr>
<tr>
<td></td>
<td>instructions to file instead of listing within this policy</td>
</tr>
<tr>
<td>07/01/09</td>
<td>Section 804: Self-Insured Coverage</td>
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<td>Section deleted. Information has been incorporated into revised Section 803</td>
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<td>07/01/09</td>
<td>Table of Contents</td>
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<tr>
<td></td>
<td>Deletes Section 804</td>
</tr>
<tr>
<td></td>
<td>Changes Title of Section 803 from Commercial Coverage to Insurance Coverage</td>
</tr>
<tr>
<td>06/12/09</td>
<td>Section 204: Recharge Centers</td>
</tr>
<tr>
<td></td>
<td>Raises cost of equipment for recharge centers that must be purchased from</td>
</tr>
<tr>
<td></td>
<td>plant funds from $1,000 to $5,000</td>
</tr>
<tr>
<td>06/01/09</td>
<td>Section 203: Facilities &amp; Administration Cost Recovery (Grants &amp; Contracts)</td>
</tr>
<tr>
<td></td>
<td>Updates schedule of rates for F&amp;A cost recovery</td>
</tr>
<tr>
<td>05/01/09</td>
<td>Section 213: Correction of Income &amp; Expense Items</td>
</tr>
<tr>
<td></td>
<td>Adds approval requirements for transactions older than 2 months</td>
</tr>
<tr>
<td>05/01/09</td>
<td>Section 1001: Records Retention Guide</td>
</tr>
<tr>
<td></td>
<td>Incorporates information previously contained in Sections 1002 and 1003,</td>
</tr>
<tr>
<td></td>
<td>which have been deleted.</td>
</tr>
<tr>
<td>05/01/09</td>
<td>Section 1002: Index of Summaries</td>
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<tr>
<td></td>
<td>Section deleted. Information has been incorporated into revised Section 1001</td>
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<tr>
<td>05/01/09</td>
<td>Section 1003: Records Retention Summaries</td>
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<tr>
<td></td>
<td>Section deleted. Information has been incorporated into revised Section 1001</td>
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<tr>
<td>05/01/09</td>
<td>Section 1101: Forms Management</td>
</tr>
<tr>
<td></td>
<td>Incorporates information previously contained in Sections 1102 and 1103,</td>
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<td></td>
<td>which have been deleted.</td>
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<tr>
<td>05/01/09</td>
<td>Section 1102: Alphabetic List of Forms</td>
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<td>Section deleted. Information has been incorporated into revised Section 1101</td>
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<tr>
<td>05/01/09</td>
<td>Section 1103: Numeric List of Forms</td>
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</table>
REVISION HISTORY: ALL CHAPTERS

Section deleted. Information has been incorporated into revised Section 1101.

05/01/09 Table of Contents
Deletes Sections 1002, 1003, 1102, 1103
Changes Title of Section 1001 from Introduction to Records Retention Guide
Changes Title of Section 1101 from Forms Management General Policy to Forms Management

05/01/09 Section 102: Conflict of Interest
Revises incorrect references

05/01/09 Section 107: Cancelling Classes or Suspending Operations
Removes incorrect reference to the department responsible for issuing announcements

02/06/09 Table of Contents
Adds Section 110, Protection of Personally Identifiable Financial and Account Information

02/06/09 Section 110: Protection of Personally Identifiable Financial & Account Information
Identifies responsibility for establishment of a program to protect personally identifiable financial and account information

01/01/09 Section 214: Disbursement – Moving Expenses
Defines moving mileage reimbursement of $0.21 per mile

01/01/09 Section 504: Methods of Transportation and Allowances
Revises mileage reimbursement to $0.52 per mile

12/01/08 Section 601: Safety & Risk Management – General Policy
Updates agency names under Codes and Standards and modifies language to be consistent with CRR

12/01/08 Section 602: Eye Protective Devices
Defines approved devices for eye protection and adds contact information

12/01/08 Section 603: Asbestos – Application, Removal, Disturbance & Disposal
Revises references to federal and state regulations

07/01/08 Section 504: Methods of Transportation and Allowances
Increases mileage reimbursement to $0.585 per mile from July 1, 2008 through December 31, 2008

06/03/08 Section 203: Facilities and Administration Cost Recover (Grants & Contracts)
Provides a new schedule of rates for Facilities and Administration cost recovery

06/01/08 Section 308: Resale, Sale or Disposal
REVISION HISTORY: ALL CHAPTERS

Adds information regarding disposal of property associated with external sponsors

06/01/08 Section 410: Real Estate – General
Revises authority, and identifies responsibilities for real estate sales, purchases and leases

05/01/08 Section 504: Methods of Transportation and Allowances
Requires air/vehicle cost comparison for long distance travel, and raises personal aircraft mileage reimbursement rate

05/01/08 Section 505: Allowable Expenses
Clarifies meal and car rental reimbursement requirements

04/22/08 Section 704: Employee Injuries & Occupational Diseases
Updates the contact information and clarifies cost of medical care

04/16/08 Table of Contents
Adds Chapter 1200, Information Technology & Telecommunications
Adds Section 1201, Definitions
Adds Section 1203, Information Security
Moves Section 412 to 1205, Telephones and Telecommunication Devices

04/16/08 Chapter 1200: Information Technology & Telecommunications
Adds new chapter

04/16/08 Section 1201: Definitions
Adds new section, defines Information Technology and Telecommunications terms

04/16/08 Section 1203: Information Security
Adds new section, describes the information security program and responsibilities

04/16/08 Section 1205: Telephones and Telecommunication Devices
Moves section from Property & Capital Equipment (formerly BPM 412)

04/16/08 Section 412: Telephones and Telecommunication Devices
Moves section to Information Technology & Telecommunications (BPM 1205)

04/08/08 Locations of the UM Business Policy Manual
Updates the hard copy locations for all campuses and system

01/08/08 Section 205: Sales Tax
Updates the tax rate for the City of St. Louis

01/01/08 Section 504: Methods of Transportation and Allowances
Increases mileage reimbursement to $0.505 per mile as of January 1, 2008

12/06/07 Section 601: Safety & Risk Management – General Policy
REVISION HISTORY: ALL CHAPTERS

Modifies language to be consistent with the CRR

11/29/07  Section 1102: Alphabetic List of Forms
          Updates alphabetic list of forms

11/29/07  Section 1103: Numeric List of Forms
          Updates numeric list of forms

10/19/07  Section 406: Vehicles
          Raises requirement for purchases of alternative fuel vehicles from 50% to 70% of non-exempt vehicles.

10/18/07  Table of Contents
          Changes name of Section 210, from Grants and Related Contracts, to Sponsored Programs

10/18/07  Section 210: Sponsored Programs
          Defines proposals and sponsored projects and identifies offices responsible for preparation, submission, negotiation, acceptance and reporting.

10/05/07  Section 109: Design and Construction Delegation of Authority
          Raises the formal bid advertisement threshold from $25,000 to $100,000.

10/01/07  Section 205: Sales Tax
          Revises tax rate for the City of St. Louis

08/13/07  Table of Contents
          Changes name of Section 407, from Inventory, to Inventory of Movable Property and Equipment

08/13/07  Section 407: Inventory of Movable Property and Equipment
          Adds policy for inventory of property associated with external sponsors, and clarifies departmental responsibilities for inventory of all movable property and equipment.

07/01/07  Location – UMR Locations of UM Business Policy Manuals
          Updates locations of the UM Business Policy Manual at UMR

03/23/07  Table of Contents
          Changes name of Section 213, from Transfer of Income & Expense Items, to Adjustment of Income & Expense Items

03/23/07  Section 213: Adjustment of Income & Expense Items
          States restrictions on timeframe for Payroll Correcting Entries (PCE) and details procedures for PCEs after the prescribed timeframe (including approvals required); and changes name of section to “Adjustments of Income & Expense Items.”
<table>
<thead>
<tr>
<th>Date</th>
<th>Section Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/07</td>
<td>Section 504: Methods of Transportation and Allowances</td>
<td>Increases mileage reimbursement to $0.485 per mile as of January 1, 2007</td>
</tr>
<tr>
<td>10/01/06</td>
<td>Section 205: Sales Tax</td>
<td>Revises tax rates for all campuses.</td>
</tr>
<tr>
<td>07/26/06</td>
<td>Section 601: General Policy</td>
<td>Updates codes and standards and assigns responsibility for safety and risk management.</td>
</tr>
<tr>
<td>07/26/06</td>
<td>Section 604: Control of Environmental &amp; Radioactive Hazards</td>
<td>Section deleted.</td>
</tr>
<tr>
<td>06/12/06</td>
<td>Section 407: Inventory</td>
<td>Requires department administrators to maintain records and establish controls for tracking sensitive or portable equipment.</td>
</tr>
<tr>
<td>05/30/06</td>
<td>Section 911: Electronic Records Administration</td>
<td>Revises requirements and responsibilities for managing electronic records, adds definitions of legal custodians and official records retention schedules, and adds a section on maintaining records associated with litigation.</td>
</tr>
<tr>
<td>05/25/06</td>
<td>Section 507: Car Rental Services</td>
<td>Revises circumstances in which Collision Damage Waiver (CDW) and Limited Damage Waiver (LDW) insurance coverage should be purchased for rental vehicles.</td>
</tr>
<tr>
<td>05/05/06</td>
<td>Section 109: Design &amp; Construction Delegation of Authority</td>
<td>Revises delegation of authority for the engagement of Architects/Engineers/Consultants, Construction Managers, Bond Financed Projects, and Master Construction Agreements.</td>
</tr>
<tr>
<td>05/05/06</td>
<td>Section 902: Records Management – General Policy</td>
<td>Expands the definition of University Records</td>
</tr>
<tr>
<td>04/30/06</td>
<td>Section 303: Bids &amp; Proposals</td>
<td>Revises the last sentence under Requests for Bids changing “responsible” to “responsive.”</td>
</tr>
<tr>
<td>04/19/06</td>
<td>Table of Contents</td>
<td>Deletes Section 605, Seat Belts. Changes name of Section 406, Use of Vehicles, to Vehicles.</td>
</tr>
<tr>
<td>04/19/06</td>
<td>Section 405: Use of University Equipment &amp; Resources</td>
<td>Changes section name referencing Section 406.</td>
</tr>
<tr>
<td>04/19/06</td>
<td>Section 306: Special Purchases</td>
<td>Moves information about purchase of vehicles to Section 406.</td>
</tr>
</tbody>
</table>
REVISION HISTORY: ALL CHAPTERS

04/19/06  Section 406: Vehicles
          Adds policy regarding purchase, operation, maintenance, required records, and disposal, sale or trade of University vehicles, and changes name of section to “Vehicles.”

04/19/06  Section 504: Methods of Transportation and Allowances
          Adds a reference to Section 406, Vehicles.

04/19/06  Section 605: Seat Belts
          Section deleted. Information has been incorporated into revised Section 406.

04/19/06  Section 705: Accidents-University Vehicles
          Updates and expands information about reporting accidents in University vehicles.

04/19/06  Section 706: Accidents-Rented Vehicles
          Updates and expands information about reporting accidents in rented vehicles.

01/01/06  Section 504: Methods of Transportation and Allowances
          Reduces mileage reimbursement to $0.445 per mile as of January 1, 2006

01/01/06  Section 105: Internal Auditing Function
          Revises authority, responsibilities, reporting relationships, and scope of internal audit functions.

10/01/05  Section 504: Methods of Transportation and Allowances
          Raises the mileage reimbursement rate for use of personal vehicles to $0.485 as of October 1, 2005.

08/24/05  Section 402: Fees for Use of University Facilities
          Adds Havener Center to list of UMR facilities charging fees, and deletes University Center.

08/24/05  Section 507: Car Rental Services
          Updates travel website URL and changes the email contact for car rental rates.

05/12/05  Section 601: Safety & Risk Management – General Policy
          Revises list of codes and standards to be followed for University facilities; and updates information for campus safety officials.

04/27/05  Table of Contents
          Adds new Section 109

04/27/05  Section 109: Design & Construction Delegation of Authority
          Codifies authority for design and construction activities.

02/18/05  UMR BPM Locations
          Provides the current list of locations on the UMR Campus.
02/18/05  UMC BPM Locations
Provides the current list of locations on the UMC Campus.

02/18/05  Section 505: Travel – Allowable Expenses
Provides current websites for reimbursements for travel outside the U.S. and District of Columbia, and for other travel information.

02/18/05  Section 218: Accountable Plan – Business Expense Reimbursements
Lists criteria for qualification of business expense reimbursements as non-taxable compensation.

02/18/05  Table of Contents
Added Section 218 on Accountable Plan – Business Expenditure Reimbursements.

02/17/05  Section 1103: Form – Numeric List of Forms
Provides a website for a numeric list of University System and Federal forms.

02/17/05  Section 1102: Forms – Alphabetic List of Forms
Provides a website for an alphabetic list of University System and Federal forms.

02/16/05  Section 1001: Introduction
More recent dates are used in the example of how to calculate retention time for University records.

02/16/05  Section 207: Sales of Products and Services
Corrects section number in reference to Inter-departmental Purchases.

01/27/05  Section 1003: Records Retention Summaries
Provides weblinks to Records Retention Summaries and Guidelines.

01/27/05  Section 901: Organization and Services
Provides a revised weblink for information about microfilm services.

01/27/05  Section 902: Records Management General Policy
Removes the suggestion to contact Records Management prior to purchase of filing equipment.

01/27/05  Section 904: Storage of Inactive Records
Updates form numbers for transmittal and storage of records.

01/27/05  Section 905: Disposal of University Records
Updates form number for destruction of records.

01/27/05  Section 1002: Index
Provides a weblink for the Index of current Records Retention Summaries.
01/27/05 Section 1101: Forms Management General Policy
Updates the lists of responsibilities for Forms Management.

01/01/05 Section 504: Methods of Transportation and Allowances
Raises the mileage allowance for use of personal vehicle from $0.375 per mile to $0.405, effective January 1, 2005.

01/12/05 Section 203: Cost Recovery (Grants & Contracts)
Provides a new schedule of rates for F&A cost recovery.

12/20/04 Section 208: Cash Receipts
Provides websites for access to the Cash Receipts Manual and The Office of The Controller.

08/01/04 Table of Contents
Adds new Section 217

08/01/04 Section 217: Incidental Expenses
Identifies various types of expenses, states when the use of University funds is appropriate, and who must approve the expenditure.

08/01/04 Section 412: Telephones and Communications Devices
Adds policy for hand-held devices and for out of office Internet Services

06/30/04 Section 211: Expenditure Accounts
Revises web link for list of expenditure accounts.

06/30/04 Section 209: Revenue Accounts
Revises web link for list of revenue accounts.

06/10/04 Table of Contents
Adds new Section 216

06/10/04 Section 216: Awards, Gifts & Prizes
Distinguishes among awards, gifts and prizes and identifies reporting requirements for employees and non-employees.

05/26/04 Section 214: Disbursements – Moving Expenses
Updates requirements for payment of moving expenses.

04/15/04 About the UM Business Manuel
Updated contact information.

04/05/04 Section 1103: Numeric List of Forms
Adds new forms, deletes discontinued forms, and updates revision dates.
### REVISION HISTORY: ALL CHAPTERS

<table>
<thead>
<tr>
<th>Date</th>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/05/04</td>
<td>1102</td>
<td>Alphabetic List of Forms&lt;br&gt;Adds new forms, deletes discontinued forms, and updates revision dates.</td>
</tr>
<tr>
<td>04/04/04</td>
<td>301</td>
<td>Delegation of Authority&lt;br&gt;Authorizes the President to waive bidding requirements for purchase of items for resale when it is in the best interests of the University.</td>
</tr>
<tr>
<td>04/01/04</td>
<td>205</td>
<td>Sales Tax&lt;br&gt;Updates Kansas City sales tax rates and clarifies taxability of rent.</td>
</tr>
<tr>
<td>03/31/04</td>
<td></td>
<td>Table of Contents&lt;br&gt;Changes titles of sections 209 and 211.</td>
</tr>
<tr>
<td>03/17/04</td>
<td>211</td>
<td>Expenditure Accounts&lt;br&gt;Replaces FRS expenditure subcodes with a reference to a website listing PeopleSoft expenditure accounts.</td>
</tr>
<tr>
<td>03/17/04</td>
<td>209</td>
<td>Revenue Accounts&lt;br&gt;Replaces FRS revenue subcodes with a reference to a website listing PeopleSoft revenue accounts.</td>
</tr>
<tr>
<td>1/1/04</td>
<td>504</td>
<td>Methods of Transportation &amp; Allowances&lt;br&gt;Raises the mileage allowance for use of personal vehicle from $0.36 to $0.375 per mile, effective January 1, 2004.</td>
</tr>
<tr>
<td>12/20/03</td>
<td></td>
<td>Index</td>
</tr>
<tr>
<td>11/12/03</td>
<td></td>
<td>Table of Contents&lt;br&gt;Adds new Section 412</td>
</tr>
<tr>
<td>11/14/03</td>
<td>412</td>
<td>Telephones and Communication Devices&lt;br&gt;Moves non-cellular phone policy from Section 405 to 412, and adds cellular/wireless telephone policies. Policies for other communication devices will be added at a future date.</td>
</tr>
<tr>
<td>11/14/03</td>
<td>405</td>
<td>Use of University Equipment and Resources&lt;br&gt;Current non-cellular telephone policy moved to new Section 412.</td>
</tr>
<tr>
<td>10/31/03</td>
<td>505</td>
<td>Allowable Expenses&lt;br&gt;Provisions were added for partial payment of expenses by another entity.</td>
</tr>
<tr>
<td>10/31/03</td>
<td>214</td>
<td>Moving Expenses&lt;br&gt;Updates references to forms used for reporting moving expenses.</td>
</tr>
<tr>
<td>07/16/03</td>
<td>505</td>
<td>Allowable Expenses</td>
</tr>
</tbody>
</table>
Late reimbursement requests may be refused, and if paid are reported as taxable income. Under certain circumstances, reimbursement for meals on extended day trips are allowed.

04/21/03  Section 504:  Methods of Transportation and Allowances
The insurance requirements for personally owned aircraft are increased from $1,000,000 to $2,000,000 per person, per occurrence and for property damage.

01/01/03  Section 504:  Methods of Transportation and Allowances
The automobile mileage reimbursement is changed to $0.36 per mile.

01/01/03  Section 205:  Sales Tax
Changes sales tax rates at UMC, UMKC and UMR.

07/01/02  Section 908:  Document Imagery
Changes section name, and text refers to electronic imaging as well as microfilming.

07/01/02  Section 902:  Records Management General Policy
Recommends use of University microfilm contracts and removes references to University microfilm facility.

07/01/02  Section 901:  Organization & Services
Removes references to university microfilm facility.

07/01/02  Table of Contents
Changes name of section 908 from “Microfilming records” to “Document Imagery”

03/22/02  Section 307:  Equipment Leases/Rentals
Raises limits for contracts requiring Board approval.

03/22/02  Section 306:  Special Purchases
Authorizes use of Hospital Consortium contracts, both bid and negotiated.

03/22/02  Section 301:  Delegation of Authority
Raises limits for contracts requiring Board approval and adds authority to purchase through the Hospital Consortium.

01/01/02  Section 504:  Methods of Transportation & Allowances
Updates the IRS mileage reimbursement rate to $0.365 per mile effective January 1, 2002.

12/01/01  Index

12/01/01  Table of Contents
The title for section 503, “Corporate Charge Cards” changed to “University Travel Cards”; the title for section 505, “Expense Allowances & Reimbursements” changed to “Allowable Expenses.”
11/26/01 Section 804: Self-Insured Coverage
Updates list of University units using the self-insurance program; revises the personal property all risk insurance information.

09/27/01 Section 301: Delegation of Authority
Reflects organizational changes associated with consolidation of procurement offices; raises bid limit to $10,000 and procurement card limit to $5,000.

08/01/01 Section 302: Organization
Section 303: Bids & Proposals
Section 305: Resale, Sale, Purchases
Section 307: Leases/Rentals
Section 308: Resale, Sale or Disposal
Reflects organizational changes associated with consolidation of procurement offices.

07/10/01 Section 803: Commercial Coverage
Removes reference to special events liability policy, both comprehensive and limited form; changes title “School Board of Liability” to “Educator’s Legal Liability.”

07/10/01 Section 707: Students & General Public (Except Vehicle Accident)
Under “Reporting Responsibilities,” campus accident and incident reports no longer need to be forwarded to UM Office of Risk & insurance Management.

05/21/01 Section 306: Special Purchases
Under Internet Purchases, adds last sentence to #3 about what receipts must be provided with the request for reimbursement; revises paragraph about Petty Cash.

05/21/01 Section 206: Petty Cash Funds
Departments may request a cash fund from the campus accounting office rather than the business office; changes title “Assistant Vice President Financial Services to “Office of the Controller

05/01/01 Section 1103: Numeric List of Forms
Section 1102: Alphabet List of Forms
Adds new forms, deletes discontinued forms, and updates form revision dates.

04/01/01 Section 205: Sales Tax
Updates UMC tax rate with ¼% city tax increase, and UMSL with 1/10% county tax increase.

01/01/01 Section 504: Methods of Transportation & Allowances
Updates the IRS mileage reimbursement rate to $0.345 per mile effective January 1, 2001.

10/01/00 Section 901: Organization & Services
Eliminates the reference to the microfilm operation providing electronic imaging services.

10/01/00 Section 902: Records Management General Policy
Eliminates the reference to the microfilm operation providing electronic imaging services.

10/01/00 Section 903: Records Management General Policy
Changes “Director of Internal Auditing” to “Internal Auditing Representative.”

08/24/00 Section 501: Authorization to Travel
Section 502: Travel Service Contacts
Section 503: University Travel Cards
Section 505: Allowable Expenses
Section 506: Cash Advances
Section 507: Car Rental Services
Web addresses updated, additions and changes associated with the new University travel card program. New accountable plan rules added to Section 505.

02/01/00 Section 1103: Numeric List of Forms
Section 1102: Alphabetic List of Forms
Adds new forms, deletes discontinued forms and updates form revision dates.

02/01/00 Section 410: Real Estate – General
Adds correct print date to footer.

02/01/00 Section 410: Real Estate – General
Revise “Leases” section to include that potential lease should be reviewed to determine if space is necessary or unnecessary to the University mission, and that terms and conditions of leases meet with prudent business practices. Also states who may approve/execute property leases and standard form contracts. Updates titles: “Chief Information Officer” to Vice President Information Systems”, and/or “Assistant” Vice President, Management Services to “Associate” Vice President, Management Services.

02/01/00 Section 403: Non-University Use of Computing facilities
Updates titles: “Chief Information Officer” to “Vice President Information Systems”; increases amount for non-University use of computing facilities/services from $500 to $1,000 before approval by UM Vice President Information Systems, or a designated representative from his office, is needed.

02/01/00 Section 301: Delegation of Authority
Section 302: Organization
Section 307: Leases/Rentals
Section 401: Use of University Facilities
Section 402: Fees for Use of University Facilities
Section 802: Purchasing Insurance
Updates titles: “Chief Information Officer” to “Vice President Information Systems”, and/or “Assistant” Vice President, Management Services to “Associate” Vice President, Management Services.

02/01/00 Section 209: Revenue Subcodes
Section 210: Grants & Related Contracts
Section 211: Expenditure Subcodes
Updates term “indirect costs” to “Facilities and Administrative (F&A) cost.”

02/01/00 Section 108: Information Management
Updates titles: “Chief Information Officer” to “Vice President Information Systems”; changes “Computing Center Directors” to “Chief Technology Officers”; removes paragraph on Information technology review Committee (ITRC.)

02/01/00 Table of Contents
Section 103: Patents
Updates term “indirect costs” to “Facilities and Administrative (F&A) costs”

01/01/00 Section 504: Methods of Transportation and Allowances
Increases IRS mileage reimbursement rate from 31 cents to 32.5 cents effective January 1, 2000.

12/15/99 Section 1003: Records Retention Summaries
Adds new records # 58-63 and updates index with these additions.

12/15/99 Section 1002: Index

12/15/99 Section 306: Special Purchases
Adds policy about Internet purchases.

10/01/99 Section 205: Sales Tax
Updates UMR tax rates with .5% city tax increase and .5% county tax increase.

08/15/99 Section 308: Resale, Sale or Disposal
Updates “Timber, Mineral or Other Natural Resources Sales” to comply with revised State Statute.

06/30/99 Section 203: Facilities and Administrative Cost Recovery (Grants & Contracts)
Updates term “indirect costs” to “Facilities and Administrative (F&A) costs”; changes some percentages on the Schedule of Rates under Research, On-Campus; adds paragraph on fringe benefit rate and how reported.

05/26/99 Section 304: Preferential Consideration
Removes preferences for U.S. products and re-states preference for Missouri products.

04/15/99 Section 210: Grants & Related Contracts
REVISION HISTORY: ALL CHAPTERS

Removes reference to Collected Rules & Regulations Section 160.030, which was rescinded in 1994.

04/15/99 Section 303: Bids and Proposals
Revises information under “Request for Bid” by adding criteria for responsible bidder; updates information on when to use an RFP; adds departmental orders, procurement card transactions, petty cash transactions or requisitions under splitting or stringing purchases.

04/15/99 Section 305: Resale, Sale, Purchases
Under “Storeroom Purchases” adds option for campuses to sell items to recognized campus organizations and approved public not-for-profit entities.

04/15/99 Section 306: Special Purchases
Revises procedures for emergency purchases and system-wide purchases; adds information on cooperative purchasing and affiliation/sponsorship by University.

04/15/99 Section 308: Resale, Sale or Disposal
Adds information on who prepares surplus property for disposal prior to transfer to purchasing department.

04/15/99 Section 407: Inventory
Changes the amount that inventory records for all non-expendable, movable property and equipment must be maintained from $1,000 to $2,500. Campuses may choose to inventory items under $2,500. Adds information about when University property may be given away; updates responsibilities under campus inventory sections, and department chairpersons or administrative heads.

04/15/99 Section 502: Travel Service Contacts
Updates phone number for UMC Travel Coordinator; removes information on tickets obtained from travel agency; adds url for accessing travel information on the web.

04/5/99 Section 1003: Records Retention Summaries
Various miscellaneous changes; adds #s 56 and 57.

04/1/99 Section 504: Methods of Transportation & Allowances
Updates the IRS mileage reimbursement rate to $0.31 per mile effective April 1, 1999.

02/10/99 Section 205: Sales Tax
Adds paragraph on sales tax charged on qualifying food items and on textbook sales exempt from state portion of sales tax rate; removes effective date of 4/1/97 from required tax table.

02/10/99 Section 211: Expenditure Subcodes
Increases dollar amount from $1,000 to $2,500 for subcode 51xx (supplies) and for subcode 77xx (equipment purchases).
1/28/99  Section 307:  Leases/Rentals
Delegation to campuses has increased for sole source purchases, Procurement Card purchases and departmental orders. It is at the discretion of campus administrators to increase delegation to individual departments. Adds authority for Assistant Vice President of Management Services to sign contracts for sole source computing maintenance agreements necessary for University computing equipment.

01/01/99  Section 407:  Inventory
Changes the amount that inventory records for all non-expendable, movable property and equipment must be maintained from $1,000 to $2,500. Campuses may choose to inventory items under $2,500.

01/01/99  Delegation to campuses has increased for sole source purchases, Procurement Card purchases and departmental orders. It is at the discretion of campus administrators to increase delegation to individual departments.

11/01/98  Section 107:  Canceling Classes or Suspending Operations
Section 210:  Grants & Related Contracts
Section 405:  Use of University Equipment & Resources

11/01/98  Section 214:  Disbursements-Moving Expenses
Updates reference to Personnel Policy Manual (PR207) to Human Resources Policy Manual (HR103).

10/01/98  Section 1102:  Alphabetic List of Forms
Section 1103:  Numeric List of Forms
Adds new forms, deletes discontinued forms, and updates form revision dates.

09/01/98  Table of Contents
Removes reference to previously deleted Sections 910 and 911; renumbers Records Audits to 910 and Electronic Records Administration to Section 911.

09/01/98  Section 502:  Travel Service Contacts
Updates the list of campus contacts for travel service information.

09/01/98  Section 504:  Methods of Transportation and Allowances
Adds information on liability insurance for personal vehicles.

09/01/98  Section 804:  Self-Insured Coverages
Adds information on liability in for personal vehicles under Auto and General Liability.

09/01/98  Section 901:  Organization & Services
Changes the word “Microfilm Lab” to “Microfilm Facility.”

09/01/98  Section 902:  Records Management General Policy
Under “University Non-Records” removes reference to magnetized, perforated and photographically coded cards.

09/01/98 Section 908: Microfilming Records
Changes the word “Microfilm Lab” to “Microfilm Facility.”

09/01/98 Section 910: Records Audits
Re-numbers Section from 912 to 910.

09/01/98 Section 911: Electronic Records Administration
Re-numbers Section from 913 to 911.

01/21/98 Section 105: Internal Auditing Function
Section 203: Indirect Cost Recovery (Grants & Contracts)
Section 301: Delegation of Authority
Section 403: Non-University Use of Computing Facilities
Section 410: Real Estate – General
Section 802: Purchasing Insurance
Section 803: Commercial Coverages
Changes term "Executive Vice President" to "Vice President for Finance and Administration".

01/01/98 Section 504: Methods of Transportation and Allowances
Changes the reimbursement rate for personal usage to the current IRS rate of $0.325 per mile.

06/17/97 Section 308: Resale, Sale or Disposal
Raises the value of surplus items which may be sold by direct sale and gives the Director of UM Business Services the authority to determine method of disposal for items over $50.

05/19/97 Section 208: Cash Receipts

01/01/97 Section 504: Methods of Transportation and Allowances
Changes the reimbursement rate for personal vehicle usage to the current IRS rate of $0.315 per mile.

11/01/96 Section 504: Methods of Transportation and Allowances
Updates information on personally owned or rented aircraft that is piloted by an employee and used for official University business.

11/01/96 Section 203: Indirect Cost Recovery
Updates base for indirect cost recovery and removes expired schedule of rates; changes
title “Vice President for Administrative Affairs” to “Executive Vice President”.

10/30/96 Section 306: Special Purchases
Changes value of University property received through the Federal Surplus Property Program that must be reported to the Inventory Control Department from $500 to $1,000.

10/01/96 Section 410: Real Estate – General
Section 403: Non-University Use of Computing Facilities
Section 304: Preferential Consideration
Changes title “Vice President for Administrative Affairs” to “Executive Vice President.”

09/01/96 Section 505: Expense Allowances and Reimbursements
Adds information on reimbursement for meals when traveling overnight, and when no overnight travel is involved. Also includes information on reimbursement for meals when traveling outside the United States and Canada. Changes the receipt requirement from $25 to $75.

08/01/96 Section 303: Bids & Proposals
Adds statement that disciplinary action may be taken for splitting or stringing purchases.

7/18/96 Section 101: University Name and Symbols
Updates title of new information document governing the use of the University Seal and Symbol; adds Internet address and, deletes reference to stationery and business cards.

07/01/96 Section 407: Inventory
Changes the expected useful life of non-expendable, movable property and equipment. Removes reference to the Surplus Property Section of the campus Purchasing Department. Changes procedures for transfer of property to another department.

04/25/96 Section 103: Patents
Adds the word “Plant Variety” to information on inventions.

04/10/96 Section 208: Cash Receipts
Revises the process of receiving cash gifts by departments, other than the Development Office, that are not direct deposit locations.

04/01/96 Section 506: Cash Advances
Revises statement on ATM usage fees.

03/20/96 Section 301: Delegation of Authority
Increases delegation limits for purchases; changes title “Vice President for Administrative Affairs” to “Executive Vice President”.

03/10/96 Section 201: Account Code Assignment & Maintenance
Changes the report name from “AMO” to “FBO”.

03/10/96 Section 202: Disposition of Checks
Removes reference to payroll offices for distribution of student checks.

03/10/96 Section 210: Grants & Related Contracts
Revises terminology and procedures for grants and related contracts.

03/01/96 Section 105: Internal Auditing Function
Changes term “Vice President for Administrative Affairs” to “Executive Vice President.”

03/01/96 Section 1002: Index
Changes the records retention sequence summary number for Forms, Record of Vacation and Absence Due to Illness to 41.

02/23/96 Section 103: Patents
Updates the information on allocation of financial returns from patent and employee inventions outside scope of University duties, and other miscellaneous word changes.

01/24/96 Section 502: Travel Service Contacts
Section 507: Car Rental Service
Section 601: General Policy
Section 706: Accidents - Rented Vehicles
Section 901: Organization and Services
Updates phone numbers affected by area code change from 314 to 573.

01/10/96 Section 702: Loss of Money, Securities & Property
Revises statement for reporting losses of $50 or more.

01/03/96 Section 407: Inventory
Removes reference to specific dates for review and return of inventory lists, and requires return by date prescribed by Inventory and Surplus Property.

01/01/96 Section 504: Methods of Transportation and Allowances
Changes the reimbursement rate for personal vehicle usage to the current IRS rate of $0.31 per mile.

12/15/95 Section 307: Equipment Leases/Rentals
Increases delegation for equipment leases and rentals, and requires approval by Chief Information Officer for certain software and computer equipment contracts.

11/15/95 Section 407: Inventory
Changes maintenance of inventory records for all non-expandable, movable property and equipment from a single cost of $500 to $1,000.

11/01/95 Section 203: Indirect Cost Recovery
Eliminates the schedule of rates for indirect cost recovery for the period 7/1/91 to 6/30/93.
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09/15/95  Section 1102: Alphabetic List of Forms
          Section 1103: Numeric List of Forms
          Adds new forms, deletes discontinued forms, and updates form revision dates.

07/01/95  Section 502: Travel Service Contacts
          Updates list of campus contacts for travel service information.

07/01/95  Section 211: Expenditure Subcodes
          Revises minimum value of supplies and equipment from $500 to $1,000.

07/01/95  Section 204: Recharge Centers
          Revises minimum value of equipment to be capitalized from $500 to $1,000.

07/01/95  Section 910: Data Bases (Creation and Management)
          Section 911: Security for Electronically Stored Administrative Information
          Deleted 7/1/95; replaced with Section 108

06/25/95  Section 108: Information Management
          New section regarding management of electronically maintained information.

06/23/95  Section 506: Cash Advances
          Adds information on Diners Card use at ATM machines and the reimbursement of the
          $5.00 transaction fee.

06/22/95  Section 502: Travel Service Contacts
          Updates list of campus contacts for travel service information.

05/15/95  Section 301: Delegation of Authority
          Changes delegation for software licenses less than $10,000.

02/06/95  Section 405: Use of University Equipment & Resources
          Adds information on personal long-distance telephone usage.

01/01/95  Section 504: Methods of Transportation and Allowances
          Changes the reimbursement rate for personal vehicle usage to the current IRS rate of
          $0.30 per mile.

12/21/94  Section 505: Expense Allowances and Reimbursements
          Removes the section on expenses not allowed, and the word “telegraph” under other
          expenses.

10/01/94  Section 205: Sales Tax
          Revises tax rate for St. Louis due to St. Louis County (Normandy) imposing a 1/4% increase.

09/01/94  Section 901: Organization and Services
Changes contacts for Records Management, Records Center, Microfilm Operations and Forms Management.

09/01/94  Section 902: Records Management General Policy
Removes Campus Records and Archives Committee for approval of records retention and disposal schedules. Adds electronic record and images to University Records list. Adds cassettes under University Non-Records.

09/01/94  Section 903: Scheduling University Records for Retention & Disposal
Changes University record retention schedules to be determined by the campus archivists, the UM Director of Records Management, the Director of Internal Auditing, and the General Counsel.

09/01/94  Section 904: Storage of Inactive Records
Under Disposal of Stored Records, written notice will be given to departments before University records will be transferred or destroyed.

09/01/94  Section 905: Disposal of University Records
Revises University record disposal so that record recognition is impossible. Prior written notice must be given to department of origin before transfer or destruction will be done to records stored at Records Center.

09/01/94  Section 907: Vital Records
Removes Campus Records & Archives Committee from vital records policy and official copy of vital records. Removes regular microfilming schedules/alternate methods from the responsibility for protection of vital records. Deletes terminated personnel files from the designated record list.

09/01/94  Section 908: Microfilming Records
Changes microfilming policy from requirements and standards of the Campus Records and Archives Committee to the American National Standards Institute (ANSI). Requisitions for microfilm purchase will be sent to Records Management for review. Materials held as reference materials are not eligible to have microfilm cost covered. Auxiliary funded departments will be charged for microfilming of records.

09/01/94  Section 909: Standard File System
The "straight line" filing system with colored labels in several configurations replaces the standard system.

09/01/94  Section 910: Data Bases (Creation & Maintenance)
Changes who appoints the data base custodian.

09/01/94  Section 911: Security for Electronically Stored Administrative Information
Changes title of Assistant Vice President for Information Technology to Chief Information Officer.
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| 09/01/94| Section 912: Records Audit  
Changes department retention schedules for records retention authorizations. Additions, deletions and changes will be made to Records Retention Authorizations rather than submitted to the Records and Archives Committee. |
| 09/01/94| Section 913: Electronic Records Administration  
New section regarding electronic records policy and procedures. |
| 09/01/94| Section 1001: Introduction  
Removes reference to Campus Records and Archives Committee and Campus Archivist. |
| 09/01/94| Section 1101: Forms Management General Policy  
Removes references to Forms Management Coordinator. |
| 07/01/94| Section 211: Expenditure Subcodes  
Revises subcodes for capital and non-capital expenditures. |
| 01/01/94| Section 214: Disbursements - Moving Expenses  
Changes standards for submittal of moving expense vouchers, and deletes paragraph on payment methods. |