### 3.1.6 Professional Licenses and Certifications

**Policy Statement**
Payment for licenses, certification fees, specialized training, or other similar expenses may be authorized for an employee when the institution requires the license, certification, or training as a condition of employment. The following requirements must be met:

- Employee is on payroll during the period that the license or certification is active for or during the time of training.
- License, certification, or training is directly related to the employee's present position and is required by the University.
- The University will benefit from the specialized training received by the employee.
- Specialized training does not involve University course credit. Any course taken which can be applied as a credit towards a University degree now or in the future would fall in this category.

**Reason for policy**
The purpose of this policy is to define when it is appropriate for licenses, certification fees, specialized training, and other similar expenses to be purchased utilizing University funds.

**Procedures**
Reimbursement may be made to the employee who paid for the license, certification, or training or the University will pay directly to the vendor. Attach a paid receipt or invoice to a completed electronic check request for payment. In those cases, where the training fee must be paid for in advance, the registration form should be submitted with a check request payable to the vendor. If food or lodging expenses are required in advance, they must be paid for by the employee and will be reimbursable, as appropriate, using normal travel reimbursement policies.

**Additional contacts**

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone Number</th>
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<tbody>
<tr>
<td>Andre Simmons</td>
<td>(706) 542-2786</td>
</tr>
</tbody>
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**Responsibilities**

- **Responsible University Senior Administrator:** Vice President for Finance & Administration
- **Responsible University Administrator:** Associate Vice President & Controller
- **Policy Owner:** Accounts Payable
- **Policy Contact:** Andre Simmons
- **Phone Number:** (706) 542-2786

**Record Retention**
Research Grant Records
Number 0472-09-006
These records relate to funded research grant proposals and research activity associated with grant funded projects. Examples of records include: supporting statistics, demographic data, draft proposals, suggested revisions, final proposals, forms, protocols, applications, research/activity reports, progress reports, and summary reports.
Retention: Final research report is permanent. All other records: 7 years after the end of the grant period.
Accounting Records
Number 0472-03-001
This series includes bank statements, purchase requests, purchase orders, requisitions, financial reports, accounts payable and receivable records, write-off records, discrepancy, payment schedules, operating statements, year-end projections, reconciliation and expenditure reports, cancelled checks, check stubs, moving expense records, cost accounting reports, refund/disbursement request records, returned checks, deposit slips, travel records, credit voucher requisition records, cash balances and reconciliations, sales and cash reconciliation records, journal entries, outstanding obligations, refund/disbursement requests, receipts and invoices.
Retention: Monthly and quarterly reports: 1 year. All other records: 5 years.

Credit Card Administration Records
Number 0472-03-013
This series documents administration of credit cards and P-cards issued to institutional staff and units. Records may include: applications, master monthly billing statements, individual card holders' statements, billing summaries, printouts including vendor analysis by code, number of charges and stores, and use summaries.
Retention: 7 years.

Policy Appendices

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<tr>
<th>Electronic Check Request System</th>
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Policy Dates
Effective Date:

Date Last Updated: 06/22/2016

Date of Last Review:

Date of Approval:

Previous Version of Policy: