How to Make a Change to an Approved Gift Card Program

Use this Step-by-Step guide to make a change to an already approved gift card program. Requests should be submitted and approved BEFORE they are implemented.

Changes can include any/a combination of the following:
- New Custodian
- New Speedtype
- Change Location
- Change Amount
- Extend End Date

Required Documentation for Update Requests:
- Change Form – Use the Gift Card Authorization Request Form
- Approval Documentation – Fully signed gift card program request & any additional approved update requests
- Tracking Logs – Showing gift cards purchased, distributed, and on-hand.
- Receipts from purchase/distribution
- Updated Internal Controls

How to fill out the Form for the following Changes:

- New Custodian (Page 2)
- New Speedtype (Page 3)
- Change Amount (Page 4)
- Change Location (Page 5)
- Extend End Date (Page 6)
1. **Change Custodian** –
   a. Check the box ‘Change Custodian’ (Shown Below)
   b. Fill in the **current custodian’s information:**
   c. Fill in the **requested New Custodian’s Information:**
   d. Requested New Custodian & Organizational Unit Authorized sign
      a. Organizational Unit Authorizer should be from a manager or approver listed on the speedtype.

Send Completed Update Request Form, Original Approval for the Gift Card Program, and Additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing this change.
2. Change Speedtype –
   a. Check the box ‘Change SpeedType’ (Shown Below)

   ![Change Speedtype Form](image)

   b. Fill out the information for the gift card program:

   ![Gift Card Program Form](image)

   c. Fill in the Requested New Speedtype in the ‘To Modify an Existing Gift Card Program’ Section:

   ![Modify Gift Card Program Form](image)

   d. Custodian & Organizational Unit Approver Sign the form:

   ![Signature Form](image)

   Send Completed Update Request Form, Original Approval for the Gift Card Program, and Additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing this change.
3. Change Amount –

   a. Check the box ‘Change Amount’ (Shown Below):

   b. Fill out information for the gift card program, including the amount change:

   c. Fill in the ‘To Modify an Existing Gift Card Program’ Section for changing a program amount:

   d. Custodian & Organizational Unit Authorizer sign the form

Certification & Authorizing Signatures

I certify that the above information is correct and that this gift card program will be in accordance with all fiscal rules governing its use. I have read and understand the PSC/Procedural Statements included in the Purpose, above, and will comply with them and all other applicable policies. Furthermore, I will comply with the following provisions:

- I will establish controls over the gift cards, so there is limited access to them and maintain the minimum quantity of inventory on hand that is effective for business.
- When the program is nearing completion, I will reduce gift card inventory to a sufficient level in order to ensure there are no cards left over when the program ends. (Gift cards are often difficult to return.)
- I will maintain adequate records on who gets gift cards on the program so an audit can subsequently endorse an audit. I will have the subject sign a receipt form acknowledging receipt of the gift card. If to protect patient confidentiality, I will maintain a file showing each card issued, the date, patient number, card number, amount of the card, and have the patient initial the file.
- For subjects subject to gift card protocols (revenue): 5 payments to a single individual equal $500 or more per year, I will have them sign and sign the IRS 35 W-2 form to collect identification for reporting.
- If the gift cards will be charged against a sponsored project or a gift fund, I certify that this is an allowable expense, complies with sponsor and donor requirements, and is within approved budget and available funding.
- I will make gift cards available for audit by properly identified campus controller’s office personnel or external auditors.

Send Completed Update Request Form, Original Approval for the Gift Card Program, and Additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing this change.
4. **Change Location**
   
   a. Check the box ‘Change Location’ (Shown Below):

   ![Checkbox Image]

   b. Fill out the information for the gift card program:

   ![Gift Card Program Information Form]

   c. Fill in the ‘To Modify an Existing Gift Card Program’ Section for changing the original card location:

   ![Modification Form]

   d. Custodian & Organizational Unit Authorizer sign the form:

   ![Signature Table]

   Send Completed Update Request Form, Original Approval for the Gift Card Program, and Additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing this change.
5. **Extend End Date**

   a. Write in: “Extend End Date” in the top section of the form (shown below):

   b. Fill out information for the gift card program, listing new end date requested:

   c. Fill in the ‘To Modify an Existing Gift Card Program’ Section with the requested new end date:

   d. Custodian & Organizational Unit Authorizer sign the form:

   Send Completed Update Request Form, Original Approval for the Gift Card Program, and Additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing this change.
To Make Multiple Changes to an Approved Program at once:

a. Select multiple boxes on the change request form for the necessary changes. See sample below:

<table>
<thead>
<tr>
<th>Action Requested:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ Change SpeedType</td>
</tr>
<tr>
<td>✅ Change Custodian</td>
</tr>
</tbody>
</table>

b. Complete the rest of the form identifying the changes.
c. Email completed Change Request Form, Original Approval for the gift card program & approved update requests, and additional supporting documentation to pcgc@ucdenver.edu. Wait for approval before implementing changes.

Questions can be emailed to pcgc@ucdenver.edu