University and College Guidelines for Student Organizations 2017-2018

The College of Pharmacy
The University of Texas at Austin
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Working with the Office of the Dean

Contact Information

Dean: M. Lynn Crismon
Executive Assistant: Janice Sutton
Assistant Dean of Administration: Debra Madden
Administrative Affairs Manager: Nicole Toomey
Administrative Manager: Janet Larsen
Administrative Manager: Thomas Bowie
Administrative Assistant: Pat Masson

Phone: 471-1737
FAX: 232-1893
Office Location: PHR 5.112
Dean’s Office Hours: Monday - Friday, 8:00 a.m. - 5:00 p.m. (closed for lunch from 12:00pm-1:00pm)
Web Site: http://sites.utexas.edu/pharmacy/about/

Meeting with the Dean

The Dean is very supportive of students and student organizations. He wants your experience with the College to be a positive one. To see the Dean, call 471-7428 or come to see Janice Sutton for assistance in setting an appointment. Ms. Sutton also coordinates events for the Dean. It is often difficult to see the Dean on same-day notice due to his schedule, although every effort will be made to accommodate you. Ms. Sutton is also available via email at: janice.sutton@austin.utexas.edu. To arrange for the Dean to speak, please let the Dean's Office know as far in advance as possible (schedules tend to be very busy) as it is often impossible to make the necessary arrangements on one day's notice. If you invite the Dean to speak at your event, plan to have him speak at the beginning, as he may have to leave early to attend another function. Please gather and bring as much pertinent information as possible when meeting with the Dean. Have names, dates, times, subject and any necessary paperwork with you when you come to the meeting and if possible, have the information available for the Dean to review before your appointment.

Conference Room Scheduling

Room reservations may be requested by students for official meetings only. No reservations for study groups will be made. The rooms in the LRC Library (PHR 3.114A, 3.114B, 3.114C, and 3.114D) can be used for study groups when not occupied. Be aware, however, that classes and reservations take priority in these rooms.

There are two categories of classrooms: general purpose classrooms (University owned) and departmental classrooms (College owned).

General Purpose Classrooms in the PHR building: PHR 2.108 (built-in broadcast capability)
PHR 2.110
PHR 2.114
PHR 2.116

Departmental Classrooms in the PHR building: PHR 2.208 (built-in broadcast capability)
PHR 2.214
PHR 3.106 (built-in broadcast capability)
PHR 3.110
PHR 3.114A
PHR 3.114B
PHR 3.114C
PHR 3.114D
PHR 4.114 (built-in broadcast capability)
PHR 5.214

All requests for use of General Purpose Classrooms must be made through the Office of the Dean of Students. The Qualtrics survey link for reserving space, can be found at the following link:

https://idp.its.utexas.edu/idp/profile/SAML2/Redirect/SSO?execution=e1s1

Departmental Classroom request:

Requests to use departmental classrooms during normal business hours (Monday-Friday 8 am-5 pm), for official meetings, will be honored based upon room availability. You may reserve departmental meeting rooms in the College of Pharmacy by accessing the web room reservation request at:

https://utexas.qualtrics.com/SE/?SID=SV_3Q7laYzm7UIMaGh

In addition, room attributes and photos can be found at:

http://sites.utexas.edu/pharmacy/about/facilities/classroom-options-on-main-campus/

For after hours requests, there are three categories of Departmental Classrooms:

**Category I:** Rooms that are locked and alarmed after 5:00 pm – includes 3.106 and 4.114
This will require a faculty advisor be present to unlock and disarm the room at the beginning of the event and lock and rearm the room at the end of event. These rooms should not be requested or reserved unless there are exceptional circumstances. These are also the broadcast capable rooms. Broadcast capability is not available after hours unless there are exceptional circumstances. Prior approval from the Dean’s Office must be obtained.

**Category II:** Locked, but not alarmed after 5:00 pm – includes PHR 2.214, 2.208, 3.110, and 5.214
A faculty advisor should make arrangements through the Dean’s Office to ensure that the room will be locked after an event. This will require a key to be checked out and returned to the Dean’s Office the next morning.

**Category III:** LRC Library rooms available for extended hours during the long semester – includes PHR 3.114A, 3.114B, 3.114C, and 3.114D
Meetings can be scheduled during the library’s normal hours of operation. Although the LRC Library hours are subject to change, in the long semester the hours that these rooms are typically available are: M-Th 8am-9pm and F 8am-5pm. The LRC Library is closed on the weekends and during semester breaks.

Other policies related to using classrooms:
No food is allowed in the departmental classrooms, with the exception of PHR 3.110. Drinks with secure lids only are approved.
All rooms should be straightened up and furniture should be returned to the configuration it was found in.
All trash should be discarded. In the case of PHR 3.110, food trash needs to be removed from the room. Large amount of trash (such as pizza boxes) needs to be taken to the dumpster located just east of the south PHR building, next to the Nano Science and Technology building (FNT).
The LRC staff is not available for any type of after hours support without prior approval from the Dean’s Office.

**Student Organization Financial Support and Financial Services**

**Background**

Funding at The University of Texas is set up in a way that is similar in concept to the personal checking account you may have at your local bank, but on a much larger scale. As with checking accounts, you have to have money in your account to be able to spend from it, and overdrafts are not allowable. However, one big difference is that we do not have ATM cards or our own checkbooks that we can write checks from. Every payment requires detailed documentation that supports the purpose and validity of the expense. There is also a system of checks and balances to protect funds from unauthorized use (everything has an approval process where at least two administrators have to sign off on each expense, regardless of the dollar amount). Generally speaking, accounts are established for a particular purpose (advising, placement, Dean’s Office operations, specific research projects, etc.) and each account can only be funded from a single source type (tuition, state appropriation, donations, endowment investment income, fees, etc.). All UT Austin account numbers are 10 digits long, and they appear in the format xx-xxxx-xxxx. Each of the various funding sources has their own specific restrictions concerning the types of expenses that are allowable from them. For this reason, it takes a diverse range of funding on a daily basis to be able to fully accomplish the mission of the College of Pharmacy and The University of Texas. As a point of reference, there are well over 1,000 individual accounts in the College of Pharmacy.

**Funding**

COP Sponsored Student Organizations may have up to three types of funding available to them, and all of the types fall under the University’s accounting umbrella. As such, income and expenses are closely monitored to ensure that all business is transacted according to the University’s financial policies and in a manner that is consistent with the mission of the College of Pharmacy and The University of Texas.

1. **Dean’s Allocations** - These are the funds that are awarded when you submit your annual budget request to the Dean each year. While the funding actually comes from various sources within the College (private donations and endowment investment income), as a default, you can reference account number 30-4213-8151. Please note that all allocations become active on August 1 and will expire on the following July 31st of each year, and organizations are expected to operate within their approved allocations.

2. **Gift Funds** - Funds that are directly donated from external sources to benefit the activities of specific COP student organizations are known as “gift funds” and are deposited into accounts that are directly and uniquely associated with each organization. While the first eight digits of these accounts all begin with 30-4213-80xx, the last two digits are unique identifiers for each individual organization. One difference between these funds and the Dean’s allocated funds is that gift funds do not expire. Another difference is that these funds may be designated by the donor to be used for a specific purpose. If that occurs, please be sure to honor the donor’s wishes. For information on strategies, policies, and etiquette concerning how to secure donations on behalf of your organization, please contact Susan Brown, Assistant Dean for Development and Alumni Affairs. It is a College requirement that you do this before you approach any prospective donors or before you accept any donations on behalf of your organization.
3. **Fundraising Accounts** - Funds in these accounts are derived from student organization activities such as fundraising and dues income. Each organization has its own separate account within the College of Pharmacy, and their first six digits all begin with 19-6000-xxxx. The last four digits are unique to each individual organization. Like gift funds, these funds do not expire. Student organizations must adhere to Pharmacy Council and Dean of Students Office policies on appropriate management and handling of funds.

Maintaining a petty cash fund (working out of a cigar box) is not an option. As a sponsored student organization, you also may not maintain an account at an outside bank or credit union. All of your financial activities must be run through UT’s accounting system, and are subject to audit from central administration or from the State of Texas. You may not operate outside of the University system under any circumstances. If discovered violating this University policy, you risk losing your sponsored status.

**Fund Balances**

As an officer and custodian of your organization’s funds, it is prudent that you have regular, direct knowledge of the balances that are available to your group. This is also necessary before you attempt to spend money from any of your available sources, since overdrafts are not allowable. **To obtain this information, please contact your faculty advisor.** If your advisor is not available, you may contact the Student Affairs Office staff in room 5.112. They will have the same balance information available to them as the advisors do, which is updated twice each month (on approximately the 1st and 16th of the month).

**Preferred Spending Methods**

**All arrangements must be made in advance.** Since your organization’s funding comes from University sources, all expenditures must be made in accordance with University and college policies and procedures. Purchasing and payment rules can be very complex, and if the correct procedures are not followed, it could result in irreversible financial consequences to you personally. Therefore, please see the Student Affairs staff (David Ocean and Cheryl Dickens) after discussion with your advisor and before doing anything that costs money. **Additionally, all purchases utilizing any of your accounts must be approved by your faculty advisor prior to submission to the Student Affairs Office for processing.** Listed in order of preference, there are basically five ways that you can spend your funds:

1. **IDT (Inter Departmental Transfer)** – There are “shops” on campus where you may make purchases by providing a valid UT account number, such as the Texas Union, Division of Recreational Sports, UT Copy Centers, and University Printing. Such on-campus sources offer the least amount of bureaucracy to purchase the types of goods and services that they offer. Please note that Dean’s Allocation funds may not be used unless prior approval is granted by Joe Sosler. Receipts from on-campus purchases are required to be delivered to Joe Sosler in PHR 5.114c within three business days.

2. **Purchase Order** – When you want to purchase tangible goods or products from an outside vendor, oftentimes they will accept a purchase order from UT. This is another good method because your purchase can be made directly out of your account with a minimum amount of time and effort. Also, assuming that timing is not an issue, your purchases can be delivered to the College so you don’t have to take the time to drive around town to make the pick-up.

3. **Credit Card** – There will be times when the most expeditious way to buy or pay for something is by credit card. The Business Office has a University-issued MasterCard, which we also call a ProCard, or procurement card. This can be loaned out for your use if the vendor won’t accept a UT purchase order. The downside of this is that you will generally have to drive to the vendor’s
place of business and this involves time on your part. For items that can be purchased online using the procurement card, you may order items using the ProCard in the Business Office. The ProCard is available for a 2 hour period when signed out and must be returned to the Business Office before the close of business.

4. **Direct Bill** – This applies to restaurants or foodservice vendors only. The College has arrangements with several local vendors, where they will deliver food to the College for meetings without you having to pay C.O.D. out of your pocket. Upon delivery, the vendor will present us with an invoice, and we have 30 days to pay them. A tax form may be needed for vendors, if requested. It is available on the 5th floor.

5. **Reimbursement** – There will be times when it may be necessary for someone from your organization to pay for goods or services out of their own pocket for approved expenditures because none of the other four options will work. In these cases, the individual may request to be reimbursed. The reason reimbursements are the least favored method is that the person seeking reimbursement assumes some personal financial risk, and because we generally do not reimburse for sales tax where the purchase of tangible goods is involved. However, sales tax can be reimbursed when charged by restaurants and caterers.

These methods are weighted the way they are because the goal is for you to conduct your business as quickly as possible, without having to spend money out of your pocket first. It is very important that you PLAN AHEAD. Our staff have a lot of other responsibilities, and it may be difficult at times for them to drop what they are doing to assist you because you have a procrastination-induced emergency. Just keep in mind that the less time you have to conduct your business, the more likely it is that your only option may be to pay the expense out of your pocket and request reimbursement at a later time.

**Allowable Expenses**

Based on our prior experience with the types of activities that your organizations have been involved in, the following broad categories of expenses are generally allowable:

1. **Professional Travel**: Any of the three funding sources may be used to pay for these expenses, although the Dean’s Allocation is the typical first choice.
2. **Meetings, Banquets, and Other Official Occasions**: Any of the three funding sources may be used; however, Dean’s Allocation funding is not permitted to be used for food purchases for meetings and events. The exception to this are the induction banquets for Rho Chi and Phi Lambda Sigma.
3. **Office Supplies**: Any of the three funding sources may be used; however, items must be ordered directly by the Student Affairs Office. Do not purchase office supplies on your own because UT has a contract with OfficeMax/Office Depot and policy dictates that you cannot be reimbursed for office supply purchases made with your own personal funds, even if your purchase was made at an OfficeMax or Office Depot store.
4. **Merchandise or Food for Resale**: This category generally encompasses products that will be resold as part of your fundraising activities. *Your fundraising account is the only source of funds that may be used for this expense.*
5. **Expenses Related to Your Organization’s Mission**: Any of the three funding sources may be used to pay for these expenses.

**Unallowable Expenses**

For any number of reasons, including state law, IRS rules, University policy, or College policy, the following broad categories of expenses are generally not allowable:
1. **Gift Cards:** Gift cards are unallowable regardless of their value.

2. **Items That Will be Given as Door Prizes:** This includes raffles as well, which is not an allowable activity.

3. **Donations to Other Organizations:** Donations are unallowable whether the other organization is within UT or outside of UT.

4. **Alcoholic Beverages:** Alcoholic beverages are not permitted to be purchased and/or served at any UTCOP student organization event. This includes setting up a cash bar or including an “uncorking” charge by the vendor.

5. **Expenses Related to Bringing in Outside Speakers:** This includes travel expenses and honoraria.

### Solicitation of Donations

All efforts to solicit donations must be coordinated with the Development and Alumni Relations staff. Keep in mind that you are in competition with many other internal and external entities trying to do the same thing that you are. For that reason, it is important to determine your fundraising needs at the beginning of the academic year and to follow these procedures. This will ensure your best chances for success without jeopardizing any other coordinated College efforts that may already be planned or underway.

1. Assign a key student who will manage the solicitation process for the student organization.
2. Fill out the Student Group Sponsorship Request Form and send to Virginia Anderson at vanderson@austin.utexas.edu or drop off to Ms. Anderson in room PHR 5.110. *(this should be submitted with your annual budget submission)*. Additional requests must be submitted early in the fall semester.
3. Development Office staff will determine the best approach to seek funds for the particular function and will assist the student in completing the request.
4. Development staff should be invited to any and all events where the sponsor will attend.
5. The student group should send personal thank you notes. The Development Office will send a formal letter of acknowledgement.
6. If the Development staff denies a request based on previous contact with that sponsor, please respect their wishes. They will do their best to help you find an alternative.

### Grant Funds for Special Projects from Cultural Proficiency Committee

The College’s Cultural Proficiency Committee has funds available that student organizations can apply for to support special projects. For examples of previous projects supported by this grant, visit the Outreach page. Student Organizations interested in applying for funds from the Walgreens Diversity Program Grant Project (awarded by the College’s Cultural Proficiency Committee), may apply for funds as follows:

1. Complete the application including the following information (included in the forms section at the back of the workbook):
   a. Student/Student Organization
   b. Faculty Advisor (approval and signature is required for submission)
   c. Brief Summary of the event (including activities to be conducted, budget for project, etc.)
   d. Goals and objectives for the project
   e. Anticipated outcomes from the project
   f. Method for evaluation
   g. Plans for how information (results) will be used to further the mission of the organization, group, etc.
2. Within one week of receipt of program funds, a report must be submitted to Dr. Carolyn Brown, Cultural Proficiency Committee Chair, at cmbrown@austin.utexas.edu and include “Walgreens Diversity Program Grant” in the subject line.

**Expenses must be approved prior to being incurred.** When submitting expenses incurred to complete your project, indicate that reimbursement should come from “Walgreens Diversity Grant Funds” from account 30-2143-6056. If you submit your paperwork referencing your student organization and failing to mention that the expenses are related to an approved diversity project award, this will result in the expenses to be incorrectly paid from one of your organization’s accounts.

**Depositing the Proceeds from Fundraising Sales Into Your Account**

As you collect cash and checks from your successful fundraising efforts, it is important to note that there are specific UT policies concerning how your funds should be handled. On the front end, each organization should develop and maintain a system of keeping records on a daily basis (in the form of a log) to account for their sales and/or collection of membership dues. If an audit is ever performed, it should be apparent that all of your collections are being deposited into your UT 19 account. These records must be retained for three years on a rolling basis. Additional training will be provided to ensure that you have an acceptable system in place.

Pre-numbered receipts must be issued to your customers to support all “over-the-counter” collections of money. The original copies of the receipts are to be given to your customers, and the duplicate copies are retained for balancing with your cash receipts log. If you collect dues, you should follow this same process. As is the case with your daily sales logs, your receipt books should also be retained for a three-year period. If your organization accepts checks in payment for dues or fundraising sales, make sure your customers/members make their **checks payable to The University of Texas at Austin**, not to your organization.

As was mentioned in an earlier section, it is not an option to maintain a petty cash fund (working out of a cigar box). All of your financial activities must be run through the University’s accounting system. The reason for this is that since you are a sponsored organization, you are acting as an agent of The University of Texas, and all of the funds you collect are as a result of your UT affiliation (although they are still designated to benefit your organization). You may not operate outside of the official University system under any circumstances. **Violations of this University policy will put your organization at risk for losing its sponsored status.**

As far as the cigar box concept goes, however, it is acceptable and practical to use some type of bag or container to collect your fundraising sales, as long as you keep it in a safe and secured place to prevent loss. Following each fundraising event, you should:

1. Have two people count and verify the cash and checks collected
2. Have one person (different from the two people who counted the cash and checks) tally and enter into your logbook the total amount of documented collections from the receipt book.
3. Compare the two totals (they should match). If you are off by more than $25.00 in either direction, you should report it to the Assistant Dean for Financial Affairs, Joe Sosler, and the Assistant Dean for Student Affairs, Diane Ginsburg.
4. If you have collected cash, you are required by UT policy to present the funds for deposit into your account within 24 hours. If you only have checks and they total $500.00 or more, then you are required to present them for deposit within 24 hours. If you only have checks and they total less than $500.00, then you should present them for deposit within one week. To make a deposit, bring your funds to Tristan D’Artagnan in PHR 5.114 between the hours of 8am-12n and 1pm-4:30pm
5. Make sure you have your account number with you.
Although operating out of a “cigar box” is not an allowable practice, it is recommended that you maintain a $20.00 reserve so that you can make change at your next fundraising event if it is your normal practice to accept cash. However, you must be able keep these funds in a secured location to prevent loss.
Procurement of Goods or Services

Procurement of Goods or Services from On-Campus Sources

Sometimes the easiest, fastest, and most economical way to do something is to use an on-campus store or service center. This includes such facilities as the Texas Union, UT Copy Centers, and University Printing. Check with the Student Affairs staff to see if what you want is available on campus. If so, they can assist you with any special details you may need to know about conducting your business. Usually the only thing needed in order to use your funds is to provide a UT account number. However, if your purchase includes food or catering you will also need to submit an approved Official Occasion Expense Form (OOEF) prior to your scheduled event. The form is available in the back of this workbook. After you complete the form, submit it to your faculty advisor for review and approval. After they review your event and approve the expense, bring the signed form to the Student Affairs staff and they will present it to the Dean’s Office to review for approval and final signatures.

If you are using Dean’s Allocation funds for your on-campus purchase, you are required to get prior approval from Joe Sosler in the Business Office. Otherwise, once you have received all of the other necessary prior approvals, you are ready to go. At this time make sure you know which account you will be using because the store or service center will need it to complete the sale. At the end of your transaction, it is very important that you get a receipt from that facility, and that you turn it in to Joe Sosler in PHR 5.114c within three business days. The Business Office is required to verify all charges made to our accounts, so we need that documentation. Also, if you end up using your Dean’s Allocation funds, the documentation is necessary to take care of the accounting to track your organization’s expenses, since all of the student groups share the same account. Failure to turn in receipts will not prevent your account/budget from being charged. It will, however, be a much more time-consuming process for the Business Office to fulfill their responsibilities related to oversight of your organization’s funds.

Procurement of Goods or Services from Outside Vendors

Should you decide that the best source for a particular purchase is from an outside vendor, then, there are three options for getting this done. The first is by UT Purchase Order. Staff from the Business Office will place your order by phone with the vendor, and the products will either be shipped to the College, or if the vendor is located in Austin, you could also have the option to pick up your order directly from them. If your purchase is to be shipped, it must be delivered directly to the College in Austin, or to an official contact at one of the remote College of Pharmacy campuses in either San Antonio, RGV, or El Paso), but, never to a home address. The advantage of this process is that you don’t have to spend any money out of your pocket, and College staff handles most of the paperwork. The procedures for this method are:

1. After you have decided on what you want and where you want to purchase it from, complete a Telephone Quotation Sheet, which may be found in the back of this workbook. You will need to list the specific products you want (including catalog # or item # if available), the exact price per item, and the quantity you are requesting. Also, make sure you write down the vendor’s business name, address, and phone number. You also need to decide which of your funding sources you plan to use. Write out the 10-digit account number and include the name of your organization.

2. The prices that you list on the Telephone Quotation Sheet should not be from a catalog or web site. They should be as a result of speaking with a vendor representative over the phone. Make sure you write down the person’s name that you talked with (first and last name), along with their telephone number.
3. After the document has been completed, your faculty advisor must approve the purchase and funding source by signing on the “Authorized Signature” line that is found in the upper right corner of the Telephone Quotation Sheet.

4. The final step in the process is for you to take the signed Telephone Quotation Sheet to the Student Affairs Office. Make sure you have your contact information somewhere on the form so that you can be contacted once your order has been completed and delivered to the College. After the Student Affairs staff accepts your request, they will forward it to the Business Office for final processing.

The second method for making purchases of goods and some services is via credit card purchase. The Business Office has a University-issued MasterCard, which we also refer to as a ProCard or procurement card. This can be loaned out for short-term use (2-hour max) from Herman Schwarzer, who is the custodian of the College’s card, upon the Student Affairs staffs’ recommendation. The procedures for this method are:

1. Follow all four steps that are listed under the purchase order procedures. The only deviation from this process will be that if you are making your purchase from a local vendor, the Student Affairs staff may decide that the best way to complete the process would be for you complete your purchase by credit card rather than by purchase order. At that point, they will ask you to present your Telephone Quotation Sheet to Herman in the Business Office.

2. Mr. Schwarzer will review your documentation to verify that the credit card may be used to complete your transaction. If it is, and if the card is not being used by anyone else at the time, he will let you check it out from him. However, he will only loan it out if it can be returned back to him within two hours, and it cannot be checked out overnight or over the weekend.

3. If you are purchasing food from a grocery store, you must have an approved OOEF before you will be allowed to make the purchase, so plan accordingly. Also, if you are purchasing food that will be used for a fundraising sales event, you must also have approval from UT’s EHS office before the day of your event. However, this approval isn’t necessary for you to check out the credit card.

4. You may not ever do business with vendors whose payments are processed through PayPal. There is a security issue with PayPal that is likely to lead to our credit card being compromised.

5. When you go to the vendor to complete your purchase, you must get an itemized receipt from them, and you cannot let them charge you sales tax. UT is sales tax exempt.

6. Under no circumstances should you ever provide our credit card number to a vendor by e-mail or other electronic communication. This is a major security issue.

7. Once you are done with your purchase, return the card to Mr. Schwarzer, along with the itemized receipt.

The final method for making purchases applies only to catering or restaurant purchases. There are some vendors who have “direct bill” arrangements with UT, whereby they will allow us to order food for meetings or events without a purchase order or without having to pay C.O.D. When they deliver their food to us, they will present us with an invoice, and we will have 30 days to pay them. The procedures for this method are:

1. Only approved College of Pharmacy approved vendors may be used for your events (e.g. monthly meetings, etc.). The list of approved vendors is included at the back of this workbook.

2. Select a vendor to cater your event from the list of vendors that we have direct bill arrangements with. You can get this list by contacting the Business Office.

3. Complete an OOEF for your event.

4. Have your faculty advisor review and sign off on your OOEF.

5. Present the signed OOEF to the Student Affairs staff. They will forward it to the Dean’s Office to review for approval and signatures. Please allow a minimum of two weeks for this to be completed.

6. Go to the UT EHS website and complete the online Food Distribution Form if the event will be held on campus. Allow a minimum of seven working days for this to be reviewed and approved.
7. Place your food order with the vendor.
8. After the event, present the invoice along with the approved OOEF and the Food Distribution approval (if appropriate) within a few days to the Student Affairs staff, and they will make sure the vendor gets paid within the required 30-day period.

When All Else Fails, How Can I Get Reimbursed?

Sometimes it may be necessary for someone in your organization to pay for goods or services out of their own pocket for approved expenditures because circumstances dictate that none of the above options will work. In these cases, the individual may request to be reimbursed for their out-of-pocket expenses. Original itemized receipts and proof of payment must be submitted along with a signed reimbursement form along with the approved OOEF, which can be found in the back of this handbook. Reimbursements are the least favored method of conducting business because the person seeking reimbursement assumes some financial risk, and because we generally do not reimburse for sales tax except where noted below. The procedures for requesting reimbursement are:

1. Complete the College of Pharmacy Student Reimbursement Form. Present this to your faculty advisor and have them sign off on it if they approve of the expense. ALWAYS CONTACT YOUR FACULTY ADVISOR PRIOR TO SPENDING ANY MONEY. YOU MUST HAVE PRIOR APPROVAL FROM YOUR FACULTY ADVISOR AND THE DEAN’S OFFICE BEFORE USING ANY OF YOUR UT ACCOUNTS.
2. If food or catering was involved, then the OOEF must be completed. If the food was/will be served on-campus, then the Food Distribution Form must also be completed. See previous information for how to complete these processes.
3. After all required approvals have been received, you may present your documentation along with an original itemized receipt to the Student Affairs staff. The receipt must show proof of payment. They will complete the process for getting you reimbursed. The receipt must contain:
   - The name and address of the vendor
   - The date of delivery or service
   - The item/service provided
   - The unit cost of the item/service
   - The number of items/services provided
   - The total cost including shipping, handling or delivery charges
   - Tax cannot be charged

   Receipts must be itemized, for example:
   - 5 veggie pizzas @ $11.00 each, total $55.00
   - 6 sausage pizzas @ $13.00 each, total $78.00
   - 20 drinks @ $1.00 each, total $20.00
   - 3 orders cinnamon sticks @ $8.00 each, total $24.00
   - Delivery charge $10.00
   - Tip $10.00
   - Grand Total: $197.00

Tips and Gratuities If the receipt is from a restaurant, a 15-20% tip on the subtotal is allowed for in-house dining. Please DO NOT tip 15-20% to delivery drivers. Please DO NOT tip 15-20% for buffets. You should never pay more than $10 as a delivery tip or for a buffet.

Sales Taxes Sales tax listed on a restaurant receipt may be reimbursed if the event is preapproved and the circumstances so dictate. Tax on food from a grocery store, bakery, food or convenience store will not be reimbursed. Also, sales taxes paid for any other purchases of goods or services cannot be reimbursed.
Special Rules Concerning Purchases of Office Supplies

All office supplies MUST be ordered from OfficeMax or Office Depot through the Office of Student Affairs. To place your order:

- **All OfficeMax/Office Depot orders MUST be signed by your advisor prior to submitting to the Student Affairs Office.**
- The OfficeMax/Office Depot order form can be found at the end of this workbook.
- Decide what items you would like to order, making note of the item number. The OfficeMax/Office Depot printed catalog is available in the Student Affairs Office (PHR 5.112), and on-line at http://www.officemax.com.

**Your order will be placed once per week** (usually every Wednesday), and will be delivered to the Office of Student Affairs, PHR 5.112, generally on Friday (or the following Monday) and must be picked up within three working days of receipt. Please plan ahead to work within this schedule.

**PLEASE NOTE:** Office supplies purchased out-of-pocket CANNOT be reimbursed.

Some items are restricted – if you have any questions, check with the Student Affairs Office staff.

Texas Sales and Use Tax Exemption Certification

Must be obtained from Student Affairs Office (SA) to demonstrate proof of UT tax-exempt status. The tax-exempt certification may only be used for official U.T. business purposes, never for personal purchases

*Special Procedures When Food Will be Served or Sold*

Food Safety Policy

There is a food safety program on campus that was implemented to ensure that food and beverages provided on campus are safe for consumption. Environmental Health and Safety (EHS) staff are responsible for conducting food safety inspections of the permitted food vendors and kitchen facilities on campus, approving distribution of food and beverages on campus by staff, students, or vendors. Prior approval from EHS is required in order to serve food on campus that is considered POTENTIALLY HAZARDOUS FOOD (PHF). PHF is any food item that, if handled or prepared improperly (or not maintained at the proper temperature), can cause a food-borne illness. Some examples of PHF are fajitas, chicken salad, hamburgers, chef salads, sausage wraps, pizza, and submarine sandwiches.

**Action Required**

Prior approval from EHS is required in order to serve food on campus that is considered PHF. **This is required whether you are serving food for a meeting, or whether you are selling food items as an organization fundraiser.** It also doesn’t matter if the food is prepared on or off campus. However, it doesn’t have to be completed if the event is taking place at an off-campus location. Approval is not required for foods that are not PHF, such as chips, cookies, candy, soda, and popcorn. Approval is also not required if you do business with the Texas Union or other on-campus catering facilities. Food distribution forms are available from the EHS Food Safety website: http://ehs.utexas.edu/programs/foodandwater/food-safety.php This is an online form that
requires a UT EID. Once approved, you will receive a confirmation e-mail from EHS. You are required to print and display the confirmation at the food distribution site during your event.

**Timeline**

EHS requires a minimum of seven working days lead-time for requests to be reviewed and processed.

**COP Procedure**

A copy of an EHS approved Food Distribution Request must be submitted to the Student Affairs staff with any payment or reimbursement voucher request. This is in addition to the Official Occasion Expense Form and all required backup documentation. Payments may be delayed or denied if this EHS approval is not included.

**Official Occasion Expense Form (OOEF)**

The Official Occasion Expense Form (OOEF) is available online (http://sites.utexas.edu/phr-student-orgs/files/2015/08/occasion.pdf) and must be processed any time University funds are being used to pay for food, beverages, and flowers related to an event. An “official occasion” is defined as a reception, luncheon, dinner, or similar event that is sponsored and funded by UT (e.g., conferences, meetings, planning retreats, staff meetings). These functions are normally associated with special programs or conferences, University guests, faculty and staff recruitment, or business meetings that span a mealtime. To prevent a personal tax liability, you will need to document each occasion with itemized receipts for expenses. The College of Pharmacy requires that an OOEF be signed by the organization’s advisor and brought to PHR 5.112, Student Affairs Office, so that the OOEF can be submitted for approval from the Dean’s Office two weeks prior to the event. **All OOEFs for fall 2017 must be submitted by 9/15/17; all OOEFs for spring 2018 events must be submitted by 1/26/18.**

The OOEF for any event should be completed by the student organization’s accounting representative. The account number to be charged and your faculty advisor’s signature are required prior to submitting to the Student Affairs Office. The Student Affairs staff submits to the Dean’s Office for approval. When approved by the Dean’s Office, the student organization representative will be contacted by email/telephone. Note that there are times when OOEF’s are not approved.

**Special Rules Concerning Large Events**

Whenever you plan to put together a large event, such as a banquet that will be held at a restaurant or hotel, you have the option to pay for the event out-of-pocket. Should you decide to do this, you would follow the standard rules associated with reimbursements. However, large events can also have a large cost associated with them. Therefore, in such circumstances, your organization may have another option available to you. You can request that the vendor direct-bill the expenses to UT. If the vendor is willing to do this, a contract will need to be prepared between the College and the vendor. When these situations arise, contact the Assistant Dean for Financial Affairs, Joe Sosler, for assistance on how to get this done. **No one in the College of Pharmacy is authorized to execute such contracts on behalf of the University, so it is very important to allow sufficient lead time for the contracts to route through the appropriate UT office to obtain the necessary signatures. **Do not attempt to execute these on your own! You would be assuming a great financial risk by doing this.**

When planning a large event, please follow these procedures:

1. Discuss your plans with your faculty advisor to get tentative approval to proceed.
2. Contact vendors for hosting your event, and to check on availability of dates.
3. After you come up with a tentative vendor, complete an OOEF form and follow the normal process for getting it approved. You must submit a detailed account of the entire contract.
4. After the OOEF has been approved by the Dean’s Office, contact Joe Sosler about whether a contract should be prepared and executed.

5. If a contract is required by either party, your event is not considered to be officially scheduled until such time as the contract has been completed and signed by both parties.

6. After the event, the vendor will present an invoice to one of the student organization representatives. Within a few days of that, the invoice should be presented to the Student Affairs Office staff for payment, along with the approved OOEF. They will see that the vendor is paid within the required 30-day period.

Professional Development Travel

Domestic Travel

COP student organization representatives often travel to conferences, workshops, meetings, etc. In order to be reimbursed for any travel expenses, it is mandatory to strictly follow the proper procedures. As soon as you know you will be traveling, please download all student travel documents from the Dean of Students website to ensure reimbursement for any monies spent (http://deanofstudents.utexas.edu/sa/stuorgstraveldom.php). ALL TRAVEL DOCUMENTS MUST BE SUBMITTED 3 WEEKS PRIOR TO TRAVEL. If you have additional questions, please contact the Student Affairs Office. All forms for domestic travel are available from the Dean of Students website (Dean of Students Office Website for Domestic Travel http://deanofstudents.utexas.edu/sa/stuorgstraveldom.php)

NOTE: A Student Travel Request Authorization Form, and associated paperwork, must be submitted to the Student Affairs staff for each individual traveling as an official representative of the College. Official representation includes the following:

1. Students awarded a travel stipend from the College
2. Students attending a conference and acting as an official representative of the College, e.g., representing the student organization chapter, presenting a paper, etc. Paperwork is required in this case even if the student is not receiving a travel stipend.

A set amount is approved for each travel stipend. Students who are awarded a travel stipend from the organization may only be reimbursed up to the maximum amount approved. Students cannot be reimbursed prior to travel.

   a. Early Registration $200.00
   b. Travel $200.00
   c. Total Stipend $400.00

Definitions regarding travel

1. An organized event is one that is initiated, planned and arranged by a member of the University's faculty or staff, or by the members of a sponsored student organization, and is approved by an appropriate administrator.

2. A sponsored event or activity is one that the University endorses by supporting it financially, or by sending students to participate in it as official representatives of the University.

3. An enrolled student is one who has been admitted to and is attending classes at the University.

4. An appropriate administrator is a Dean, Department Chair, or Director of an administrative unit, or their delegate.
Only students in good academic standing are permitted to receive travel stipends from the College. If approved for travel reimbursement please provide any and all original, itemized receipts pertaining to your travel. These must be submitted to Tristan D’Artagnan in room PHR 5.114, along with the travel scholarship form (signed by the student and their faculty advisor), at the completion of the trip in order to be reimbursed. In addition, Travel MUST BE COMPLETED before any personal reimbursements will be given -- no exceptions!

Your faculty advisor must sign off on all travel paperwork prior to submitting to the Student Affairs Office for approval. Once your travel paperwork has been approved, your advisor should notify faculty of student organization travel (this can be done by sending an e-mail to faculty indicating the meeting, student(s) who will be attending, date(s) and location of the meeting/event). Students are responsible for requesting permission for alternate exam times, making up missed classes, labs, etc. COP faculty are not required to grant permission for an alternate exam time or for making up any missed work.

Travel policy documents (University-required paperwork) must be completed by any student organization traveling or participating in an event more than 25 miles from campus (this includes travel to a faculty member’s house and/or other venue that is more than 25 miles away from the University. Students attending events from other campuses are also required to complete travel paperwork).

Two members of the organization should be appointed to serve as “travel coordinators” (individuals responsible for collecting all university-required paperwork and submission to the COP Student Affairs Office). Travel Coordinators are responsible for the following:

b. Completion of the Request for Authorization Student Travel: University Organized or Sponsored Events Form
c. Release and Indemnification Agreement – Adult Student
d. Authorization for Emergency Medical Treatment – Adult
e. Comply with University Policies for Travel: [link]
f. Submitting all required documentation to their advisor for approval prior to travel.
g. Submission to Student Affair Office three (3) weeks prior to travel

Student Travel Policy for University Organized or Sponsored Events
(See policy memorandum: [link])

This policy applies to the travel of enrolled undergraduate and graduate students (including professional students, e.g. pharmacy students) to attend activities or events that are: organized and/or sponsored by The University of Texas at Austin; and occur more that twenty-five (25) miles from the University campus. This includes travel to an advisor’s home that is 25 miles from campus and/or travel from any assigned region to attend a COP function/event. Students must obtain prior authorization for such travel from their faculty advisor and Diane B. Ginsburg, Assistant Dean for Student Affairs. All required travel paperwork must be submitted to the Student Affairs staff at least 3 weeks prior to scheduled travel. Paperwork submitted after that time will not be processed.

Student Travel Policy for Registered Student Organizations
(See policy memorandum: [link])
This policy applies to the travel of student members of a registered student organization when: the organization requires its student members to attend an activity or event; and the activity or event occurs more than twenty-five (25) miles from the University campus.

Registered student organizations that require student members travel to and from events or activities that are covered by this policy must obtain prior authorization for such travel from their faculty advisor and Diane B. Ginsburg, Assistant Dean for Student Affairs. All required travel paperwork must be submitted to the Student Affairs staff at least 3 weeks prior to scheduled travel. Paperwork submitted after that time will not be processed. *This includes travel to an advisor’s home that is 25 miles from campus and/or travel from any assigned region to attend a COP function/event.*

**Travel-Related Forms**

Many forms are required for student travel. The forms can be downloaded from the International Office website at https://world.utexas.edu/abroad

And, you may use refer to the forms and instructions on the college’s website at http://sites.utexas.edu/phr-student-orgs/links-and-documents/

**International Travel**

In order to support all students traveling to international locations, the University has put into place the Student Travel Policy for International Locations. All undergraduate, graduate, and professional students participating in activities or events abroad (whether required or optional) are required to comply with this new policy. Students traveling abroad are required to register online with UT’s International Travel Registry, attend a one-hour pre-departure workshop, and submit basic information about their travel to the Study Abroad Office prior to departure. Please note, students participating in official study abroad programs are not required to complete the International Travel Registry or attend the workshop, as students on established programs follow a parallel process outlined by the Study Abroad Office. Additional information on this policy may be found at: http://www.utexas.edu/student/abroad/ITR/index.html.

**College of Pharmacy Student Organizations and the LRC**

Welcome! We at the LRC are excited about the opportunity to work with student leaders at the College of Pharmacy. We are looking forward to increased collaboration with your organizations. Below please review a few items that might of interest to you.

On behalf of the Learning Resource Center staff,
Oliver Gomez
Director of the LRC
512-471-3075
oliver.gomez@austin.utexas.edu

1) **Video conferencing for student organizations meetings:**
   a. Your membership meetings are scheduled in rooms that have built-in video conferencing capability, an LRC staff will establish the video-conferences as “multi-point meetings” using our video conferencing bridge. It would be good for one or two of your members to be familiar with the control panel in the rooms used by your group. During this summer the College is updating many of the rooms. The control panels are being reprogrammed and should be ready for use by
August 15th. **The LRC will meet with all student organizations during their first meeting to review the procedures for using the videoconferencing system.** During the semester, if you face any connectivity or quality issues please contact the LRC as soon as possible. You can use the wall phone, which is in most classrooms. The red button on the phone is programmed to speed dial the LRC office.

b. Your ad hoc or officer meetings are not scheduled in any particular rooms; we encourage the use of Adobe Connect for these meetings. Adobe Connect allows multiple participants in a meeting and you can share content as well. If you need to record the meeting you can do so. We recommend the following steps: (1) Attend an Adobe Connect training session conducted by the LRC. (2) Make sure you have the authorization to create a meeting room within Adobe Connect. We can do that for you by sending your EID to ITS. (3) Pre-create a meeting room for your group to reduce setup time, (4) start a few minutes early and go through the quick setup wizard to make sure camera and microphone are setup correctly.

c. If you only need to connect two sites then you may also consider using Skype. Most of you are familiar with Skype so we are not planning on a training session. However, if you do want such a session please let us know.

2) The LRC is also responsible for maintaining the College’s web site. However, your organization is responsible for providing updated and accurate content for your organization’s web pages. To submit changes to your pages, please email changes or additions to Oliver Gomez at oliver.gomez@austin.utexas.edu. Please include the URL for the page(s) you are editing and indicate what changes you would like made.

3) Another responsibility of the LRC is to maintain the Audio/Visual (A/V) capabilities of our rooms. If you are giving a presentation in a classroom, please submit an A/V request, even if you know how to use the technology. Sometimes, the equipment in a particular room is taken offline (maintenance, repair, replacement, etc.). If we know there is a presentation planned, we will make sure there is equipment in the room to service your request.

4) Take advantage of the hallway monitors to promote your meetings and events. Contact Vicki Matustik to submit a request. Please submit the request at least 7 days before you would like the message to appear.

5) The LRC is responsible for the networks in our buildings. This includes security matters. For example, if the Security Office discovers a compromised computer is connected to our network they will let the LRC staff know. We contact the user to try to remedy the problem. Many times, it is best to reimagine the computer. You can use the ITS Helpdesk facility in FAC second floor to help with such remedies. Often you should consider resetting passwords for all your accounts that were accessed from a compromised computer and be on the lookout for identity theft. Also, be aware that sharing copyrighted material can bring the attention of the copyright owner to you and they might demand compensation in the thousands of dollars. Sometimes downloading a large video even if it is not copyrighted is not acceptable at the College since it tends to saturate the network. The network is designed and paid for to be used for the academic goals of our faculty, staff and students. Please be careful!
6) The LRC provides a number of other services for the College such as student computer labs and more. We are interested in hearing from you about ideas that might help your organizations be even more successful. If you have an idea, and if there is an IT angle to it, come and talk to us!

Dean of Students Office (DOS) Requirements

Risk Management Education Program

All student organizations are required to complete the Risk Management Education Program on an annual basis. At least three (3) authorized representatives (including the organization’s President/CEO/Chair) must attend at the beginning of the fall semester. Faculty advisors only have to attend the education program one time. An online pre-test and modules must be completed prior to the in-person workshop. The DOS will be conducting an in-person workshop for all COP student organization representatives (including distant campuses) during the fall semester. Date and time will be provided to you. This session will be done during a Pharmacy Council meeting. The President and three (3) additional representatives from each organization must attend the workshop. Organization representatives who attend the program must present the information to their organization following attendance of the training program. To comply with the University’s Risk Management Education Program, the following must be completed by authorized organization representatives (see Risk Management Education Program Checklist for Authorized Representatives (Fall Groups) in the back of the workbook).

Annual Registration

All sponsored and registered organizations are required to register their organization with the Dean of Students Office at the beginning of the fall and spring semesters. To register your organization, you must complete a registration application packet (all forms available from DOS at http://deanofstudents.utexas.edu/ and pay $10.00. The fee is only paid at the beginning of the fall semester and can be paid from any of your UT accounts. After you complete the application packet, submit it to your faculty advisor for approval and then submit it to the Student Affairs Office. They will forward your packet to the Dean for his approval. Once your application is approved by the Dean, you will be notified that you can pick up your application packet and submit it to the Dean of Students Office for approval. Student organization representatives will receive an e-mail confirmation from DOS that your organization has been registered. Failing to register your organization could jeopardize your organization’s ability to use any of your University accounts, so it is critical that your organization comply with this University policy. Other information to support your organization can be found at the DOS website: http://deanofstudents.utexas.edu/

Screening Activities and Project Collaborate

Student organizations serve the University and other communities by performing service activities and participating in health fairs. The College of Pharmacy has specific policies and procedures that must be adhered to when any student organization is performing health screenings and/or participating in any health fairs. The COP’s policies and procedures can be found on the College’s website under Health Fair Documents at http://sites.utexas.edu/phr-student-orgs/links-and-documents/. Failure to comply with these procedures may prohibit the organization’s participation in future events.
Notification of Dean’s Office with Semester Activities, Speakers, etc.

All student organizations serve an essential role in helping the College fulfill its mission. It is important that the Dean’s Office is notified and aware of the activities that each organization will be doing on an annual basis. Frequently, organizations invite speakers, dignitaries, and others to the College to present at monthly meetings, special events, etc. The Dean, and other representatives from the Dean’s Office, faculty and staff, may be interested in attending an organization’s event, meeting with invited guests, etc. Communication of your organization’s activities is vitally important. At the beginning of each semester (fall and spring), please provide the Assistant Dean for Student Affairs with the following information for each event your organization has planned on the Student Organization Events Form (included in the back of this workbook). **Submit completed forms by 9/1/16 for the Fall 2016 semester, and by 1/23/17 for the Spring 2017 semester.**

Policies for Use of the College’s Wordmark and University Trademarks

College of Pharmacy sponsored student organizations may use the University and College’s name and logos if they adhere to University and College policies on the use of trademarks. The College has recently adopted a new wordmark in line with university branding. Beginning this fall, this artwork will be available for student use in promotional items. The existing college mark will continue to be available as well. Student organizations wishing to produce promotional items for sale/distribution must secure written approval of their intended art work/design PRIOR to contracting with a vendor. To secure approval for a product design, first gain approval from your faculty advisor. Once you have your faculty advisor’s approval, send an electronic copy (PDF) of your intended design along with a brief description of the product you with to produce to Vicki Matustik at matustik@austin.utexas.edu. Once your design has been approved by Ms. Matustik, you must gain approval from Pharmacy Council to prevent production of an item that another organization may be selling. Complete procedures for using the College’s wordmark and the University’s trademarks are listed below and designs are included in the back of this workbook. Vicki Matustik’s contact information is as follows:

**Vicki Matustik, communications coordinator • 2409 University Avenue, STOP A1900 • Austin, (512) 232-1769 • vicki.matustik@austin.utexas.edu**

**Student Promotions 2016-2017**

The goal is to establish a consistent branding of The University of Texas at Austin College of Pharmacy by using the College wordmark. The college is transitioning to a new wordmark that reflects closer its affiliation with the university. The new college wordmark will be available beginning this fall in several orientations. We will continue to use the stylized bowl of hygeia as well. The new mark; however, will be the one used as text to represent the college. Guidelines for using the new wordmark will be found beginning in late August at [http://www.utexas.edu/pharmacy/faculty_staff/wordmark.html](http://www.utexas.edu/pharmacy/faculty_staff/wordmark.html). Student organizations wishing to use the wordmark for producing products should request a high resolution version of the chosen orientation by contacting Vicki Matustik, communications coordinator, via email at matustik@austin.utexas.edu. It is appropriate to use the mark for student organization products, on student business cards, on posters/displays and other opportunities for identifying yourself or your organization as representing the UT College of Pharmacy. Current inventory of products/business cards/and other materials displaying the old mark may still be used.

**Products**

Student organizations wishing to produce promotional items for sale/distribution must secure written approval of their intended art work/design PRIOR to contracting with a vendor. To secure approval for a product design, first gain approval of the design from your faculty advisor. Once you have the faculty advisor’s approval, send
an electronic copy (PDF) of your intended design along with a brief description of the product you wish to produce. This information should be emailed to Vicki Matustik, communications coordinator, at matustik@austin.utexas.edu. Remember to do this prior to giving your vendor approval for production. If you design does not have this approval, you will not receive funding. Once you have an email from Vicki Matustik verifying your approval, print out a copy of the email and attach it to your funding form when you submit it to the Office of Student Affairs for funding.

Bevo, the word TEXAS, and certain identifiers for The University of Texas at Austin are trademarked by UT Austin. No one may use these images without review and written permission to reproduce from the UT Office of Trademark Licensing. You can incorporate UT trademarked images into your products, BUT you MUST have approval from Trademark Licensing prior to submitting your artwork for production. Approval from Licensing Trademark does not replace approval from the college communications coordinator. To gain approval from the Trademark Office, you will submit the artwork and information about your intended product via the Trademark Portal found at https://portal.trademarks.utexas.edu/. Look for the “LOG IN” box at the bottom of this page and follow the prompts to submit your request.

Plan ahead. Approval from a faculty advisor may be delayed if that faculty member is out of town. Approval can generally be obtained from the college communications coordinator within 24 hours. Trademark Licensing requires at least 48 hours for approval. Be sure to allow sufficient time for the approval process. University protected marks can only be produced by vendors by way of approval from the Trademark Office. Only licensed vendors may gain permission to print university marks. Proper process for gaining approval is the same as for other product development. Start with approval from your faculty advisor, and then submit the design to the college communications coordinator. Once you gain approval from the communications coordinator, submit the design to Trademark Licensing. Products produced without prior approval from the college communications coordinator and (if necessary) Trademark Licensing may not be funded.

**Student Business Cards**

Students are permitted to produce business cards. To assure consistency in our brand, the preferred format is included in the forms section in the back of this workbook. You may personalize your information and include whatever contact information you choose. Contact information is not required. Your identifier can be your Pharm.D. student status and year or you can include an elected office or student organization affiliation.

**Publications**

You must obtain approval from your faculty advisor before printing a student organization newsletter. It is recommended that you utilize the services of the publications editor in helping you plan your publication. This office can assist you in determining the best publication format, and the most cost effective manner for producing your communication piece. All publications from the college, including student organization publications, should include the college wordmark. You can also obtain print quality resolutions of the wordmark from Vicki Matustik, publications editor for the college. In addition to the wordmark, all publications should include the university tagline “What starts here changes the world.”

**Research posters**

Any research or professional poster should incorporate the college wordmark as the identifier for the University of Texas at Austin College of Pharmacy. Do not use the college seal. Be aware of the color guidelines and orientation options described above. These posters DO NOT require advance permission from the publications office prior to printing. Posters can be designed and printed for you in the college in the IDL in PHR 3.112. An
account number will be required so that cost of printing can be billed. Please be sure to carefully read information about *poster production services* on the website (http://sites.utexas.edu/adrgs/research-tools/resources/poster-design-printing/). Advanced scheduling is required for design and printing services.

**Organization Electronic Letterhead**

If your student organization wishes to communicate via electronic letterhead, the correct header for the letterhead is included in the forms section at the back of this workbook.

**Forms**

The following pages have some common forms that are generally required for your organizations to conduct business during the year. If you don’t find the forms that you need, please consult with the Student Affairs Office staff, PHR 5.112 between the hours of 8am-5pm M-F. You may also find what you need on the College of Pharmacy website at http://sites.utexas.edu/phr-student-orgs/links-and-documents/. 
College of Pharmacy Student Reimbursement Form

Name of Person to be reimbursed: ________________________________

UTEID: ________________

Address: _______________________________________________________
________________________________________________________________

Phone #: ________________ Email: ________________________________

Student organization: ____________________________________________

Date of event: _____________________

Purpose of event: ________________________________________________
________________________________________________________________

Amt of reimbursement: ________________

Funds to be used for the expense:
___ Dean’s annual allocation ________________________________
___ Gift funds ________________________________
___ Student Org. funds (19 acct) ________________________________

Signature of person to be reimbursed: ______________________________

Signature of student organization adviser: __________________________
To:  T. D’Artagnan - Business Office 5.114  

Date: __________________________

Subject:   Student Travel Reimbursement Form

On behalf of the College of Pharmacy and the student group___________________, it is our pleasure to inform you that you have been awarded $__________________ to help pay for your travel expenses and registration fees to a scientific meeting during the ____/____ academic year. These funds will be made available to you AFTER you have attended the meeting. Please retain ALL original receipts for expenses incurred from the meeting. Please submit your original receipts and a copy of your abstract within two weeks of returning from your meeting. These scholarships are being awarded with the understanding that your expenses are not being completely covered by other funds. Your travel scholarship may not exceed your actual expenses associated with travel to the meeting. If you do not attend the meeting, please inform a representative or advisor as soon as possible. We hope you will join___________________ in thanking the Dean for his generous support of your travel/education. If you have any questions, please contact any representative or your advisor.

Please complete the following within 2 weeks of returning from your meeting.

Print Clearly

Meeting Attended: ________________________________________________________________

Dates of Meeting: ______________________________________________________________

City and State of meeting/event: ________________________________________________

Your Name:____________________________________________________________________

UT EID: ___________________________ Your Contact Phone # ______________________

Current address:________________________________________________________________

ALL APPLICABLE STUDENT TRAVEL PAPERWORK/REQUESTS WERE SUBMITTED AND AUTHORIZED PRIOR TO TRAVEL DATES.

__________________________                    ______________________________
Student’s signature                                       Advising Professor’s Signature
**Student/OfficeMax/Office Depot Order Form**

(After filling out this form please turn it in to the Student Affairs Office in PHR 5.112). (The OfficeMax web site is www.officemax.com). You may look at this web site to get your catalog numbers. On-line pricing may not reflect your true price as determined by our contract with OfficeMax.

<table>
<thead>
<tr>
<th>Item #</th>
<th>Quantity</th>
<th>Description</th>
<th>Page #</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

Name of Organization: ______________________________________ Abbreviate: __________

Name of Student ordering: __________________________________________

Student Phone #: ________________________________________________

Student E-mail: ________________________________________________

Account to be Charged: __________________________________________

President's Signature: __________________________________________

Advisor's Signature: ____________________________________________
University of Texas College of Pharmacy
Student Group Sponsorship Request Form

Group Name: ______________________________________________________

Mission: __________________________________________________________

______________________________________________________________

President or Contact: ____________________________________________

Advisor: __________________________________________________________

Name of Event: ____________________________________________________

Date of Event: ______________________

Purpose of the event: _____________________________________________

______________________________________________________________

______________________________________________________________

Group(s) attending: _____________________________________________

______________________________________________________________

Expected # of attendees: ______________

Amount of money requested: ________________________________

The sponsorship money will pay for: ________________________________

______________________________________________________________

Opportunities to recognize the sponsor at the event:

______________________________________________________________

______________________________________________________________

______________________________________________________________
## Vendor List

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Vendor Phone Number</th>
<th>Vendor Address</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Market, HEB, Randall's</td>
<td></td>
<td></td>
<td>ProCard – provide Herman in Bus. Office w/previously approved OOE. All receipts returned to him. Check out &amp; return ProCard the same day.</td>
</tr>
<tr>
<td>On-campus purchasing</td>
<td></td>
<td></td>
<td>I.D.T. – Complete paperwork for copying, etc. in TX Union, giving org. name &amp; acct. #. Orig. receipt to Bus. Off.</td>
</tr>
<tr>
<td>Austin's Pizza (5% tip only)</td>
<td>512.795.8888</td>
<td>2324 Guadalupe St., 78705</td>
<td>Acct # 471-1737 David Ocean (Invoice Sent 7-10 business days)</td>
</tr>
<tr>
<td>Austin's Pizza (5% tip only)</td>
<td>512.835.1111</td>
<td>1950 Rutland Dr., 78758</td>
<td>Acct # 471-1737 David Ocean (Invoice Sent 7-10 business days)</td>
</tr>
<tr>
<td>Chick Fil A</td>
<td>512.473.8651</td>
<td>MLK UTDTO</td>
<td></td>
</tr>
<tr>
<td>Domino's Pizza (Austex Pizza)</td>
<td>512.477.0101</td>
<td>1900 Guadalupe St., 78705</td>
<td>Provide the following info: UT College of Pharmacy, your name, phone # and billing address: University of Texas, College of Pharmacy, Room 5.112, Austin, TX 78712</td>
</tr>
<tr>
<td>Double Dave's Pizzaworks (IDC Pizza, LLC)</td>
<td>512.476.3283</td>
<td>3000 Duval St., 78705-3823</td>
<td>Provide the following info: UT College of Pharmacy, your name and Fax #, (student affairs fax # 512-232-1893) 78712</td>
</tr>
<tr>
<td>El Mercado Restaurant</td>
<td>512.477.7689</td>
<td>1702 Lavaca St., 78701</td>
<td>Provide the following info: UT College of Pharmacy, Student Affairs, FAX 232-1893</td>
</tr>
<tr>
<td>Fazoli’s Italian Restaurant (Austapasta Ltd)</td>
<td>512.335.4436</td>
<td>13201 RR 620 N, Suite S, 78717</td>
<td>UT College of Pharmacy</td>
</tr>
<tr>
<td>Fricano's Deli (Frimuba LLC)</td>
<td>512.482.9980</td>
<td>104 E. 31St. St. # C, 78705</td>
<td>UT College of Pharmacy</td>
</tr>
<tr>
<td>Jason's Deli (Deli Mgmt)</td>
<td>512.453.8666</td>
<td>1000 E. 41St. St. # 940, 78751-4856</td>
<td>Acct # U11460</td>
</tr>
<tr>
<td>Jimmy John’s Gourmet Subs (Bushwood Invest. LLC)</td>
<td>512.499.0100</td>
<td>3203 Red River St., 78705-2612</td>
<td>Acct UT College of Pharmacy, 471-1737, David Ocean</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Phone Number</td>
<td>Address</td>
<td>Account Information</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------</td>
<td>---------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Jimmy John's Gourmet Subs (Bushwood Inv.)</td>
<td>512-457-4900</td>
<td>516 Congress Ave., 78701-3502</td>
<td>Acct UT College of Pharmacy, 471-1737, David Ocean (Invoice Sent 7-10 business days)</td>
</tr>
<tr>
<td>Jimmy John's Gourmet Subs (Bushwood Invest. LLC)</td>
<td>512-478-3111</td>
<td>601 W. MLK Blvd., 78701</td>
<td>Acct UT College of Pharmacy, 471-1737, David Ocean (Invoice Sent 7-10 business days)</td>
</tr>
<tr>
<td>Juan in a Million</td>
<td>512-576-9975</td>
<td>2300 E. Cesar Chavez St., 78702-4604</td>
<td>Acct # 471-1737, David Ocean (Place all orders thru catering)</td>
</tr>
<tr>
<td>Oishi Japanese Fusion</td>
<td>512-236-0207</td>
<td>2025 Guadalupe Street, 78705</td>
<td>Provide David Ocean's name. Order 48 hours in advance. Prefer pick up.</td>
</tr>
<tr>
<td>Pizza Hut (Heart of Texas Pizza)</td>
<td>512-320-8030</td>
<td>1811 Guadalupe St., 78701-1216</td>
<td>Acct # 471-1737 David Ocean</td>
</tr>
<tr>
<td>Scholz Beer Garden</td>
<td>512-474-1958</td>
<td>1607 San Jacinto, 78701</td>
<td></td>
</tr>
<tr>
<td>Tiff's Treats</td>
<td>512-473-2600</td>
<td>1806 Nueces St</td>
<td>&quot;UT College of Pharmacy Student Affairs&quot; - account name</td>
</tr>
<tr>
<td>Zen Japanese Food</td>
<td>512-300-2633</td>
<td>3423 Guadalupe St., 78705</td>
<td>Acct # 471-1737 David Ocean</td>
</tr>
<tr>
<td>Zen Japanese Food</td>
<td>512-232-1418</td>
<td>2201 Speedway, 78712</td>
<td>Acct # 471-1737 David Ocean</td>
</tr>
</tbody>
</table>

*When placing an order, make sure you give the vendor you name and phone number.  
*If the vendor does not put the org’s name on the invoice, please add before turning into Stu. Affairs.  
*Tip can be 10% of TOTAL, but no more than $10.  
*If the tip is provided, student should legibly sign next to the tip.  
*Original itemized invoices and receipts need to be turned into Student Affairs immediately after the event.
Risk Management Education Program
Checklist for Authorized Representatives (Fall Groups)

Each registered student organization must ensure that at least three (3) authorized representatives (including the organization’s President/Chair/CEO) each complete all of the steps listed below (except for re-registration, which can be completed by one authorized representative).

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Location</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1. Complete Online Pre-Test Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• NOTE: You will be able to access this system beginning on August 29, 2011</td>
<td></td>
<td>September 2, 2011</td>
</tr>
<tr>
<td>□ Representative Completes the Pre-Test Assessment</td>
<td>Online</td>
<td></td>
</tr>
<tr>
<td>Step 2. Complete the Eight (8) Online Training Modules &amp; Post-Tests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• URL: <a href="http://deanofstudents.utexas.edu/sa/pses/onlinetrain.php">http://deanofstudents.utexas.edu/sa/pses/onlinetrain.php</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• NOTE: You can access the Online Training Modules once you have completed the pre-test assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Completes Eight Modules and Post-Tests</td>
<td>Online</td>
<td>September 16, 2011</td>
</tr>
<tr>
<td>Step 3. Register Online for In-Person Workshop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• NOTE: You can access the Workshop Registration System once all modules are completed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Registers for In-Person Workshop</td>
<td>Online</td>
<td>September 16, 2011</td>
</tr>
<tr>
<td>Step 4. Attend In-Person Workshop</td>
<td></td>
<td></td>
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<tr>
<td>• NOTE: You can check here anytime to see which workshop you selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Completes In-Person Workshop</td>
<td>Classroom</td>
<td>Date of Workshop</td>
</tr>
<tr>
<td>Step 5. Complete the Online Follow-Up Survey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• URL: <a href="https://www.utexas.edu/student/dos/sa/pses/followupsurvey.php">https://www.utexas.edu/student/dos/sa/pses/followupsurvey.php</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Completes Follow-Up Survey</td>
<td>Online</td>
<td>November 11, 2011</td>
</tr>
<tr>
<td>Step 6. Train Your Organization’s Full Membership &amp; Adopt a Risk Management Policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• URL: <a href="https://www.utexas.edu/student/dos/sa/pses/leaderkit.php">https://www.utexas.edu/student/dos/sa/pses/leaderkit.php</a></td>
<td></td>
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</tr>
<tr>
<td>• NOTE: You will not be able to access this system until you have completed the in-person workshop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Downloads Required Materials</td>
<td>Online</td>
<td>November 11, 2011</td>
</tr>
<tr>
<td>Step 7. Complete the Online Presentation Certification Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• URL: <a href="https://www.utexas.edu/student/dos/sa/pses/presentcert.php">https://www.utexas.edu/student/dos/sa/pses/presentcert.php</a></td>
<td></td>
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</tr>
<tr>
<td>• NOTE: You will not be able to access this system until you have downloaded the training materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Representative Completes Presentation Certification Form</td>
<td>Online</td>
<td>November 11, 2011</td>
</tr>
<tr>
<td>Step 8. Complete Spring 2011 Student Organization Re-Registration Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• URL: <a href="http://deanofstudents.utexas.edu/sa/reregsched.php">http://deanofstudents.utexas.edu/sa/reregsched.php</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• NOTE: Please make sure all names, UT EIDs, Phone Numbers, and Email Addresses are accurate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Complete the “Online Organization Registration Form”</td>
<td>Online</td>
<td>November 21, 2011</td>
</tr>
</tbody>
</table>
# Student Organization Events Form

This form must be completed and submitted to the Assistant Dean for Student Affairs at the beginning of the Fall and Spring Semesters for each event being planned by your organization.

<table>
<thead>
<tr>
<th>Student Organization:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Advisor:</td>
<td>Advisor’s Signature:</td>
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<tr>
<td>Event:</td>
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<tr>
<td>Date and Time:</td>
<td></td>
</tr>
<tr>
<td>Location:</td>
<td></td>
</tr>
<tr>
<td>Invited Speaker(s), Guest(s)</td>
<td></td>
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<tr>
<td>Activity:</td>
<td></td>
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<tr>
<td>Purpose of Activity:</td>
<td></td>
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<tr>
<td>Objectives for Activity:</td>
<td></td>
</tr>
<tr>
<td>Audience (check all that apply)</td>
<td></td>
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<tr>
<td></td>
<td>_____ Students</td>
</tr>
<tr>
<td></td>
<td>_____ Faculty</td>
</tr>
<tr>
<td></td>
<td>_____ Staff</td>
</tr>
</tbody>
</table>
GUIDELINES for STUDENT ORGANIZATION DEPOSITS

Funds should be brought to the Business Office on a weekly basis, or at such time as receipts total $500 or more, whichever occurs first.
Prior to delivery of funds, please follow the guidelines below:

Make checks payable to UT AUSTIN

ALL CHECKS SHOULD BE PHOTOCOPIED AND THE PHOTOCOPIES SHOULD BE SUBMITTED WITH THE CHECKS.

CASH AND CHECKS TOTALING MORE THAN $500 MUST BE DEPOSITED DAILY

ALL CHECKS SHOULD BE ENDORSED with the College of Pharmacy “FOR DEPOSIT ONLY” stamp.

TWO (2) ADDING MACHINE TAPES ON CHECKS must be submitted with the deposit.

You may use the copier in the Business Office (Room 5.114) to make copies of the checks. An adding machine and a stamp are also available in the Business Office.

Note:

- Adding machine tapes should begin with 0.00 or 0.C (indication that machine was cleared before running tape).
- The tapes should be as long as the length of the checks.
- Computer-generated tapes are not allowed.

The student delivering the funds will log the deposit into the Business Office “Cash Receipts Journal” and will be issued a receipt from a receipt book.

Please keep a file of these receipts and the photocopies of the checks along with pertinent information (total amount delivered, date delivered, account number, and event or purpose).
These documents should be made available upon request by Business Office staff or by Internal Audits to satisfy audits requirements.
## TELEPHONE QUOTATION SHEET

### Authorized Signature

<table>
<thead>
<tr>
<th>Req. No.</th>
<th>Purchase Order No.</th>
<th>Account No.</th>
<th>Account Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Bid Requester</th>
<th>Phone No.</th>
<th>Bid Date</th>
</tr>
</thead>
</table>

Company Contacted:

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Phone No.</th>
<th>Fax No.</th>
<th>Per:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Qty</th>
<th>Unit</th>
<th>Price</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<tr>
<td>2</td>
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</tr>
</tbody>
</table>

Complete Name and Address of Vendor

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
</table>

Terms

F.O.B.

Delivery Time

VID#
**Walgreens Diversity Program Grant Project/Event Report**
The University of Texas College of Pharmacy
Coordinated by the Cultural Proficiency Committee

Please complete the following brief report of your project/event which was supported by the Walgreens Diversity Program Grant program.

**Within one week of receipt of program funds**, please submit this report to Dr. Carolyn Brown, Chair of the Cultural Proficiency Committee, at cmbrown@mail.utexas.edu and include “Walgreens Diversity Program Grant” in the subject line.

Student/Student Organization: _____________________________________________

Faculty Advisor: __________________________ Signature: ________________________
(Faculty Advisor name and signature required.)

Faculty/Staff Name: ______________________________________________________

Office Address: __________________________ Mail Code: ________ Phone: __________

Report Prepared By: __________________________ Date: _________________________

Student E-Mail Address: __________________________ Faculty E-Mail Address: __________

Phone: Office ____________ Cell _____________

**Brief Summary of Event**
Give a brief summary of the project/event based on the goals, objectives and activities$strategies involved in this request.

**Evaluation**
Based on your plan for evaluating the success of the project/event, was your project successful?

How will the evaluation results be used?
Student Promotions 2017-2018

To establish consistent branding for and familiarity with The University of Texas at Austin, the university’s communications office released branding updates and guidelines. Therefore, the college’s previous wordmark (see below, left) is now a “spirit” symbol. It may be used in legacy items and other internal-facing publications and promotions.

To adhere to new university guidelines, please use the updated College of Pharmacy branding. The new wordmark is the appropriate identifier for The University of Texas at Austin College of Pharmacy and available in numerous formats and orientations.

The Official College Brand

This is the preferred college brand and should be your first option in most cases. Examples might include t-shirts, posters, signs, or other outward facing materials.

The informal preferred college brand (see left) can only be used if the preferred college brand is
also used somewhere on the page or within the document. They do not have to appear on the same page or side.

Additionally, both the preferred college brand and informal college brand must print in two colors – as is presented above in orange and black. There is a grayscale and knockout (all white) version available for materials with dark backgrounds.

For square-oriented materials, please use the stacked version of the logo (see above, left), which currently appears on the College of Pharmacy’s Facebook, Twitter, and Instagram accounts.

**Formal Wordmarks**

Other versions of the new brand include the Formal University/College Brand (see left). This is recommended for more formal use such as research initiatives, especially those independent in nature or involving collaborations with other University of Texas at Austin research programs.

You may also use the University/College brand (see right) for research initiatives, especially those involving collaborations with research teams from other universities.

To request high-resolution versions of the College of Pharmacy wordmark, email Nick Nobel at nobel@utexas.edu.
Products

Student organizations that wish to produce promotional items for sale and/or distribution must secure written approval of their intended artwork or design prior to contracting with a vendor. Follow the process below for design approval:

1. Gain approval of your faculty advisor.
2. Gain approval of the Pharmacy Council.
3. Email Nick Nobel (nobel@utexas.edu) with images and a brief description of the product.
4. If the design contains certain UT Austin trademarks such as the wordmark, Longhorn, tower, burnt orange, etc. you will need Trademark approval.
5. Upon Nobel's approval, submit your design to the Trademarks portal (https://portal.trademarks.utexas.edu) for final approval.
6. UT branded items must use an official UT vendor. See the portal for a list of approved vendors.

Give yourself as much time as possible for this approval process. Because design and branding minutiae, the Trademarks office may reject it even with college approval. Please work closely with Nick Nobel with as much lead time as possible to assure a smooth approval process.

Publications

You must obtain approval from your faculty advisor before printing a student organization newsletter, website, email list, or social media account. Please contact Nick Nobel for advisement on how best to promote your organization or event. Often, an Instagram account or monthly newsletter seems like a good idea, but as students you only have so much time and bandwidth to keep distribution constant and consistent. Talk to Nick Nobel about your ideas and he can give suggestions on how best to proceed. There may be something already in place to help, thus avoiding your need to reinvent the wheel.
For all publications, print or digital, be sure to have high resolution files for the appropriate wordmark. Print and digital use different color formats (CMYK vs. RGB), so be sure to make your request as descriptive as possible.

**Letterhead**

Email Nick Nobel for a version of the official letterhead (below) you’d like to use for your student organization. You can also request a custom letterhead with your organization’s name.

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**Prep for Success**

It’s important to remember your organization or event represents The University of Texas at Austin and the College of Pharmacy. Maintaining professional, consistent, and effective branding reflects well on the university, college, and peers. Guidelines and processes are not meant to stymie ambition and enthusiasm, but support it. By maintaining a realistic timeline and open communications with college staff, you can maximize the impact of your organization’s activities, accomplishments, and events.

Furthermore, the college is always eager to promote your events and accomplishments on the website, newsletter, university publications, emails, and social media accounts. Contact Nick Nobel if you have any news or updates about your organization. Provide high quality photos, descriptions, and a call to action, and it will surely reach a much wider audience. If you’re not sure what is and isn’t newsworthy, ask.
# Student Organization Official Occasion Expense Form

To prevent a personal tax liability, each occurrence must be documented with receipts for expenses. A written statement including the information requested on this form must accompany the payment voucher for processing within 30 days of the occasion.

<table>
<thead>
<tr>
<th>Student Organization:</th>
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<tbody>
<tr>
<td>Account to Be Charged:</td>
<td></td>
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<tr>
<td>Form Prepared by:</td>
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<tr>
<td>Email:</td>
<td></td>
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<tr>
<td>Phone Number:</td>
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<tr>
<td>Today’s date:</td>
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</table>

<table>
<thead>
<tr>
<th>Event Location:</th>
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<tbody>
<tr>
<td>Date of Event:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Names of Attendee(s): (if 10 or less)</th>
<th>Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
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Approximate number attending: (for groups of more than 10)

<table>
<thead>
<tr>
<th>Purpose of the event:</th>
<th></th>
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</table>

Benefit to The University of Texas:

<table>
<thead>
<tr>
<th>Estimated Cost:</th>
<th>Actual Cost: (to be filled out by Business Office)</th>
</tr>
</thead>
</table>

Check the following boxes if applicable to your event:

- Recruiting Purposes? □
- Seminar? □
- Contract Required? □
- Contract attached? □
- Recurring Event? [ ] If checked, select frequency: Weekly □ Bi-Weekly □ Monthly □ Yearly □
- Vendor: Direct Bill □ ProCard □ Other □
- Vendor: Direct Bill □ ProCard □ Other □

Amount for Food: ____________________ Amount for Other: ____________________

Explain what funds are to be spent on: ____________________

Additional Notes: ____________________

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Requested by: ____________________ Date: ____________________

Advisor’s Signature/Designated Signer

Approved: ____________________ Date: ____________________

Debra Madden/Dean M. Lynn Crismon

Form revised 7/2013
OFFICIAL OCCASION EXPENSE FORM INSTRUCTIONS

The Official Occasion Expense Form is a tool to ensure that all data necessary to process a reimbursement or payment request for an official occasion or entertainment expense is submitted.

**Date of Event:** Date of event, not the date the form is being completed.

**Location/Place:** Name of business establishment, restaurant, etc. where event occurred. If event did not take place in Austin, please identify city and state.

**Examples:**
- Faculty Center
- PHR 5.112H, Dean’s Conference Room
- County Line Restaurant, San Antonio, TX

**Participants:** List participants by name, title, and affiliation, if ten or less.

**Examples:** (If 10 or fewer)

<table>
<thead>
<tr>
<th>Name of Participant(s)</th>
<th>Title</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. John Doe</td>
<td>Professor</td>
<td>UT Austin, College of Pharmacy</td>
</tr>
<tr>
<td>Dr. Jane Doe</td>
<td>Professor</td>
<td>UTHSCSA, Pharmacotherapy</td>
</tr>
<tr>
<td>Dr. Jill Gee</td>
<td>Professor</td>
<td>Texas Tech Univ., College of Pharmacy</td>
</tr>
<tr>
<td>John Doe</td>
<td>Manager</td>
<td>People’s Pharmacy</td>
</tr>
</tbody>
</table>

**Group Attending:** If more than ten people participated, supply a general description and approximate the number of people that attended.

**Example:** (General description if over 10)
Pharmacy graduate students and faculty in the Faculty Lounge (PHR 5.108), Twenty-five people attended.

**Purpose:** Supply a brief explanation of the purpose of the events.

**Examples:**
- Refreshments were provided at meeting to discuss joint research projects between UT Austin, UTHSCSA, and CompanyX
- Buffet was provided at reception for graduate students to meet new faculty members in the department.
- Lunch was provided to people attending all day meeting of the department’s visiting committee.

**Benefit to UT:** Supply a brief explanation of how the event is expected to benefit the university or the benefits actually derived from the event.

**Examples:**
- To further the relationship between higher education and industry in the area of Pharmacy research. CompanyX has entered into an agreement to provide funding for 3 years to the research consortium between the universities.
  - The visiting committee provides the department with guidance in the direction the department should be going with respect to educational issues.

**Estimated/Actual Costs:** The individual signing the "prior to" OEOF’s needs to know the estimated expenses for the event so that they can make an educated decision whether or not to approve the OEOF request.

**Check Boxes:** The information requested here provides additional information to help determine approvals and funding for the event. If a contract is required, please attach a copy.

**Signatures:** These are required for approval of any document.