As of August 1, 2020: The impact of COVID-19 has significantly affected College operations and the past few months have been a time of change for all of us. As we move into the 2020-2021 academic year, we will need to continue to be flexible in how we adapt to the way student organizations function within the university and the College of Pharmacy. We are updating guidelines and services to students in order to meet these changes. Our goal is to ensure that student organizations continue to engage with each other, but in a safe (and most likely virtual) environment.

While we have tried to outline these changes in the information provided below, further changes may need to be implemented in order to ensure the well-being and safety of our community.

Affected policies are highlighted in orange throughout the document.
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**Pharmacy Council Executive Committee**

**President:** Daniel Alonso  
**Immediate Past President:** Hannah Adair  
**Vice President:** Lisa Hsi  
**Financial Director:** Prakruti Gandhi  
**Secretary:** Nida Madni  
**Student Government Representative:** Elizabeth Zhu  
**Senate Representative:** Isha Deshpande  
**Faculty Advisor:** Dean Bryson Duhon

For the Student Organization Master Contact List, please visit this [link](#).
Working with the Office of the Dean

Contact Information

Dean: M. Lynn Crismon / Samuel Poloyac (starting term on Oct 15)
Executive Assistant: Nicole Toomey
Assistant Dean for Administrative Affairs: Debra Madden
Administrative Manager: Kimberly Wood
Administrative Manager: Janet Larsen
Administrative Manager: Thomas Bowie
Administrative Manager: Jeff Becker
Senior Administrative Associate: Jeannie Dillon

Phone: 512-471-3718
FAX: 512-232-1893
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/

Building Hours

BUILDING HOURS ARE UNKNOWN AT THIS TIME DUE TO COVID-19 / EXPECT BUILDING ACCESS RESTRICTIONS

Monday – Friday: 7AM – 7PM (open access) / 7PM – 11:30PM (access with UT ID at the celebrated entrance)
Saturday – Sunday: Closed (access with UT ID at the celebrated entrance from 7:00am-11:30pm)
Holidays: Closed (access with UT ID at the celebrated entrance from 7:00am-11:30pm)

Meeting with the Dean--Virtually

The Dean is very supportive of students and student organizations. He wants your experience with the College to be a positive one. To virtually meet with the Dean, email Nicole Toomey (nicole.toomey@austin.utexas.edu) for assistance in setting an appointment. It would be unusual for you to meet with the Dean on same day notice due to his schedule.

Signatures from the Dean--Electronically

Due to the Dean’s busy schedule, it is not possible to have documents signed on the same day. Please plan ahead and submit paperwork at least one week ahead of schedule. Submit documents electronically to the Dean’s Office at https://utexas.app.box.com/f/6d041a72353f4dfe4a8ca37229a6d4cc3. Assistant Dean Debra Madden will review all documents and then, if approved, will sign and send back to Student Affairs. When necessary the document will be routed to the Dean for review for approval.

Conference Room Scheduling

NO ROOM RESERVATIONS WILL BE ACCEPTED UNTIL FURTHER NOTICE. NO ROOMS MAY BE RESERVED. All meetings should be scheduled virtually and occur at a remote location.
**Emergency Information**

**Emergencies**

Always call 9-1-1 in any emergency situation before contacting any other individuals. Once the appropriate emergency services have been contacted, please call 512-471-1737 or 512-471-3718 as soon you are able. The Dean’s Office and Dean Duhon will be notified.

**COVID-19 Reporting**

**COVID symptoms, exposure, and tests (regardless of results) must be reported**

Students (non-employees) should report COVID exposure and/or testing results to University Health Service (UHS): [https://healthyhorns.utexas.edu](https://healthyhorns.utexas.edu)

**BCAL**

The Behavior Concerns Advice Line (BCAL) is a service that provides the University of Texas at Austin’s faculty, students, and staff an opportunity to discuss their concerns about another individual’s behavior. This service is a partnership among the Office of the Dean of Students, the Counseling and Mental Health Center (CMHC), the Employee Assistance Program (EAP) and The University of Texas Police Department (UTPD). An individual can either call the line at 512-232-5050 or report their concerns using the online submission form.

**SUREWalk**

*Due to the pandemic, SUREWalk services are not currently being offered. The University has not made a determination at this time regarding the resumption of these services. The following link is expected to provide updates as they arise: [https://docs.google.com/forms/d/e/1FAIpQLSfyMYQrhttiSiyW2LV7NZZ_LtosIQ7cOMCaBKrtriFx7ozLOHA/viewform](https://docs.google.com/forms/d/e/1FAIpQLSfyMYQrhttiSiyW2LV7NZZ_LtosIQ7cOMCaBKrtriFx7ozLOHA/viewform)*

If you are on campus late and have concerns about your safety getting home, all students, faculty, and staff can request SURE Walkers to accompany them. Two SURE Walkers may accompany you on your walk home or provide a complimentary cart or car ride, depending on service area, Monday – Sunday 8AM – 2AM. Their phone number is 512-232-9255.

**UT Night Rides**

*Due to the pandemic, UT Night Rides are not currently being offered. The University has not made a determination at this time regarding the resumption of these services. The following link is expected to provide updates as they arise: [https://parking.utexas.edu/night](https://parking.utexas.edu/night)*

If you are located on campus late and have concerns about driving home, you can utilize Lyft to receive a free ride home. Locations served mirror current UT Shuttles routes for West Campus, Far West, Lake Austin, North Riverside, Lake Shore, Crossing Place, Red River, and Intramural Fields. All SURE Rides must originate from main campus only. This service is provided 7 days a week, 11PM – 4AM. For detailed information to utilize this service, visit this website: [https://parking.utexas.edu/sure](https://parking.utexas.edu/sure)
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 must 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

**NO FOOD EXPENSES OR IN-PERSON EVENTS ARE CURRENTLY BEING ALLOWED FOR THE 2020-21 ACADEMIC YEAR**

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 for all food-related expenses (not allowed for the 2020-21 year) and 19-4606-1051 for non-food expenses, including professional travel (only meeting registration for virtual meetings will be reimbursed in the 2020-21 year). Some organizations may also have their own designated account to support professional travel. Please note that all allocations become active on September 1 and will expire on the following August 15th 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 six digits of these accounts all begin with 30-6000-xxxx, the next four 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 Amanda Mendez (AMendez@austin.utexas.edu). 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 next two 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 drawer or a cash 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. Additionally, all purchases utilizing any of your accounts must be approved by your faculty advisor (and in some cases, the Dean’s Office) 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 you may need. Please note that Dean’s Allocation funds may not be used unless the expenses were included in your approved budget and without prior approval being granted by Assistant Dean, Joe Sosler. Receipts from on-campus purchases, regardless of the account being charged, are required to be emailed to Assistant Dean, Joe Sosler within three business days. Due to COVID restrictions on campus, submission of IDT approvals and receipts must be emailed to Dean Sosler (joe.sosler@austin.utexas.edu) during the 2020-21 year.

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. Direct Bill NO FOOD PURCHASES ARE ALLOWED DURING THE 2020-21 ACADEMIC YEAR – 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 will have 30 days to pay them. A tax-exempt form may be needed for vendors, if requested. The form is available at the end of this document.

4. **Reimbursement** — There will be times when it may be necessary for someone from your organization to pay for an allowed item out of their own pocket for approved expenses 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. **Reimbursement claims should be submitted (using the document on page 27) via email to Cat Schlichting (C.Schlichting@austin.utexas.edu) in the Student Affairs Office.**

These methods are ranked 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 understand that occasionally true emergencies do occur they are always there to assist. However, they have a lot of other responsibilities, and it may be difficult at times for them to regularly 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. Venmo or related vendors are NOT an approved method of payment.

**Allowable Expenses**

**DURING THE COVID PANDEMIC, NO TRAVEL WILL BE ALLOWED. ANY EXCEPTIONS (WHICH ARE UNLIKELY) MUST BE REQUESTED THROUGH THE DEANS OFFICE. A DETAILED, ITEMIZED REQUEST must be submitted to the Dean’s Office at https://utexas.app.box.com/f/6d041a72353f4dfe4ca37229a6d4cc3.**

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 (virtual meetings only):** 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:** **THIS IS NOT ALLOWED UNLESS AN EXCEPTION IS APPROVED BY THE DEANS OFFICE. Submit exception requests to the Dean’s Office at https://utexas.app.box.com/f/6d041a72353f4dfe4ca37229a6d4cc3.**

3. **Office Supplies:** Any of the three funding sources may be used; however, items must be ordered directly by the Student Affairs Office (see order form on page 29). Do not purchase office supplies on your own because UT has a contract with OfficeMax/Office Depot and UT 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. **Please email completed order forms to Cat Schlichting (C.Schlichting@austin.utexas.edu)**

4. **Merchandise or Food for Resale:** **THIS IS NOT ALLOWED UNLESS AN EXCEPTION IS APPROVED BY THE DEANS OFFICE. Submit exception requests to the Dean’s Office at: https://utexas.app.box.com/f/6d041a72353f4dfe4ca37229a6d4cc3.** 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 professional 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.
6. **COVID RELATED**: No travel, food ordering, banquets, entertainment, or any event necessitating in-person meetings

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. These funds must be used to support an educational endeavor.

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 Amanda Mendez at amendez@austin.utexas.edu (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 Diversity and Inclusion Committee (special projects must be reviewed by the Dean’s Office to ensure established COVID related guidelines and mitigation strategies are followed)

The College’s Diversity and Inclusion Committee has funds available that student organizations can apply for to support special projects. Student Organizations interested in applying for funds from the Walgreens Diversity Program Grant Project (awarded by the College’s Diversity and Inclusion 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 are 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, Diversity and Inclusion 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 30-2145-0351. 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**

**NO IN-PERSON SALES ALLOWED UNLESS PRIOR AUTHORIZATION GRANTED BY DEAN DUHON**

To deposit fundraising proceeds during the 2020-21 Academic Year, please make an appointment with Cat Schlichting (C.Schlichting@austin.utexas.edu) in the Student Affairs Office. Checks are heavily preferred.

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. 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. Please note, no profit-sharing is allowed (i.e. dining at a restaurant on a specific night where some of the proceeds are returned to the organization).

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 drawer or a cash 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 cash 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 of Student Success, Bryson Duhan.

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, please make an appointment with Cat Schlichting (C.Schlichting@austin.utexas.edu) in the Student Affairs office.

5. Make sure you have your account number with you.

Although operating out of a “cash 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. For special events, prior approval for increased amounts.

**GUIDELINES for STUDENT ORGANIZATION DEPOSITS**

Funds should be brought to the Student Affairs Office on a weekly basis, or at such time as receipts total $500 or more, whichever occurs first.

- **Payment:** checks only and checks must be payable to **UT Austin**
- **Payments may be mailed to the Student Affairs Office or if you are a current student, faculty and staff you may drop off check payments to the Student Affairs Office by appointment only.**

  **Mailing Address:**
  
  2409 University Ave. A1900
  Austin, TX 78712

- **Checks that are received will be deposited by Student Affairs Staff to the Business Office on Thursdays between 8am-12pm. Copies of the checks and receipts will be scanned and uploaded to UT BOX for student organizations to access for record purposes.**

**Procurement of Goods or Services**

**Procurement of Goods or Services from On-Campus Sources**

*No food purchases or in-person events are allowed for the 2020-21 Academic Year.*

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. Typically, the only thing needed in order to use your funds is to provide a UT account number.

If you are using Dean’s Allocation funds for your on-campus purchase, you are required to get prior approval from Assistant Dean, Joe Sosler in the Business Office (joe.sosler@austin.utexas.edu). It is important to have the correct account number to be charged by a campus service. At the end of your transaction, it is very vital that you get a receipt from that facility, and that you email it to Assistant Dean, Joe Sosler (joe.sosler@austin.utexas.edu) **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.
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 two 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 the remote College of Pharmacy campus in San Antonio, 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 Purchase Request Form, 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 Purchase Request Form 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 Purchase Request Form.

4. The final step in the process is for you to email the signed Purchase Request Form 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 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. No food purchases are allowed for the 2020-21 Academic Year.

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 Student Affairs Office.

3. Complete an OOEUF for your event.

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

5. Present the signed OOEUF 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. If your event is intended for anyone outside your organization, then a Food Distribution is required.

7. Place your food order with the vendor.

8. After the event, present the invoice along with the approved OOEUF and the Food Distribution approval (if appropriate) within 2-business 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. **No food purchases are allowed for the 2020-21 Academic Year.**

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 $5.00
     - Grand Total: $192.00

**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. Please note Dominos adds auto gratuity. **No food purchases (including Dominos) are allowed for the 2020-21 Academic Year.**

**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. Sales tax on food picked up or delivered will not be reimbursed, dine-in only. Also, sales taxes paid for any other purchases of goods or services cannot be reimbursed. **No food purchases are allowed for the 2020-21 Academic Year.**
Special Rules Concerning Purchases of Office Supplies

All office supplies MUST be ordered from OfficeMax/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 emailing to Cat Schlichting (C.Schlichting@austin.utexas.edu) in 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 on-line at http://www.officemax.com.

Your order will be placed within a week and will be delivered to the College of Pharmacy Receiving Room, PHR 2.112. You will be notified when the order arrives to coordinate an appointment or pick up.

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

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

Texas Sales and Use Tax Exemption Certification

Must have to demonstrate proof of UT tax-exempt status, the form can be found in the back of this document. The tax-exempt certification may only be used for official UT business purposes, never for personal purchases.

Official Occasion Expense Form (OOEF)

No food purchases or in-person events are allowed for the 2020-21 Academic Year.

The Official Occasion Expense Form (OOEF) must be processed in advance 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. The form may be found at the at end of this document.

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 review for approval from the Dean’s Office two weeks prior to the event. All OOEFs for fall 2020 must be submitted by 9/4/20 for Sept/Oct events, 11/6/20 for Nov/Dec events; all OOEFs for spring 2021 events must be submitted by 1/29/21. (OOEF’s are not anticipated to be received this year due to the food/in-person restrictions, however, exceptions may apply). 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. No stamp/e-signatures are allowed, only scanned or original signatures are permitted Note that there are times when OOEF’s are not approved.
Special Rules Concerning Large Events

No in-person events are allowed for the 2020-21 Academic Year.

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 OOE Form and follow the normal process for getting it approved. You must submit a detailed account of the entire contract.
4. After the OOE Form has been reviewed for approval by the Dean’s Office, contact Assistant Dean, 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 OOE. They will see that the vendor is paid within the required 30-day period.

Professional Development Travel

No travel funds will be refunded through December 31, 2020. The University will make a determination at that time whether to extend the travel restrictions or not. Registration stipends for virtual meetings will be allowed.

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 forms for domestic travel are available from the College of Pharmacy Links and Documents website under “Student Travel”

IF YOU ARE TRAVELLING MORE THAN 25 MILES FROM CAMPUS, ALL TRAVEL DOCUMENTS MUST BE SUBMITTED 3 WEEKS PRIOR TO TRAVEL. If you have additional questions, please contact the Student Affairs Office.

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.

   Example: ASHP Midyear Clinical Meeting, Las Vegas, NV
   i. Early Registration $200.00
   ii. Travel $300.00
   iii. Total Stipend $500.00

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 (have your advisor contact Dean Duhon for approval). If approved for travel reimbursement please provide any and all original, itemized receipts pertaining to your travel. These must be submitted to the Student Affairs Office, 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. 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:

a. Completion of the Request for Authorization Student Travel: University Organized or Sponsored Events Form (this is the only required form to be completed for virtual meeting stipend processing)
b. Release and Indemnification Agreement – Adult Student
c. Authorization for Emergency Medical Treatment – Adult
d. Comply with University Policies for Travel: http://www.policies.utexas.edu/policies/student-travel-policy-university-organized-or-sponsored-events
e. Submitting all required documentation to their advisor for approval prior to travel.
f. Submission to Student Affairs Office three (3) weeks prior to travel
**Student Travel Policy for University Organized or Sponsored Events**

*No travel or in–person meetings is allowed for the 2020-21 Academic Year*

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 than 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 Bryson Duhon, Assistant Dean of Student Success. 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**

*No travel or in–person meetings is allowed for the 2020-21 Academic Year*

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 Bryson Duhon, Assistant Dean of Student Success. 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 may not be approved if turned in late.*

**International Travel**

*No travel or in–person meetings is allowed for the 2020-21 Academic Year*

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. All sponsored organization international travel must be approved by the Office of Student Affairs. **PLEASE NOTE THAT ANY INTERNATIONAL TRAVEL REQUIRES A MINIMUM OF 6 MONTHS PRIOR NOTICE FOR APPROVAL BY THE COLLEGE OF PHARMACY.** Requests for travel to countries or areas identified as high risk will not be approved.
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
512-471-8451
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 (via Cisco WebEx), an LRC staff member will start your WebEx meeting for you. It would be good for one or two of your members to be familiar with the Classroom AV and WebEx touch panels in these rooms. The LRC will meet with all student organizations during their first meeting to review the procedures for using the WebEx video 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, to call upstairs to the LRC. The number is printed on the phone, that number is: 512-471-1400.
   b. Your ad hoc or officer meetings are not scheduled in any particular rooms; we encourage the student organization leaders to schedule these using your Pharmacy WebEx host account. A WebEx host account has been created for each student organization president. If you do not know your WebEx login credentials contact John Reineke in the video control room: john.reineke@austin.utexas.edu

2) The LRC is responsible for maintaining the College’s web site. The College will have a new website format– more information forthcoming. 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 your advisor, or Assistant Dean Bryson Duhon (duhon@austin.utexas.edu) for content approval. Once approved please email to Oliver Gomez (oliver.gomez@austin.utexas.edu). Please include the URL for the page(s) you are editing and indicate what changes you would like made. Your advisor may also be granted the ability to edit your organization page.

3) The LRC also maintain the Audio/Visual (A/V) capabilities of our rooms. (No Audio/Video Requests are being accepted for the 2020-21 Academic Year). 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) The LRC manages voice and data networks in our buildings. This includes reporting and remediation of security matters. The UT Information Security Office (ISO) will refer security incidents to the LRC for investigation. Computer viruses, compromised passwords, or hacked systems that are connected the College of Pharmacy network will be reported to the LRC and blocked from using the network. Personally, owned devices should be taken to the ITS Helpdesk on
the 2nd floor of the FAC building for help remediating the problem. Please be aware that sharing copyrighted material can also result in a referral from the ISO.

5) In addition, the LRC provides a number of other services for the College including lecture capture, desktop support, poster printing, and support for offsite College events. We are interested in hearing from you about any 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

Safety Education Program

All student organizations are required to complete the Safety Education on an annual basis. At least one (1) authorized representative (Either the organization’s President/CEO/Chair or primary contact on HornsLink) must attend at the beginning of the fall semester. Faculty advisors only have to attend the education program one time. The DOS will be conducting a virtual workshop for all COP student organization representatives (including distant campuses) in October 2020 in lieu of the October Pharmacy Council meeting. The President and one (1) additional representative from each organization must attend the workshop (the person listed on Hornslink must be in attendance). Organization representatives who attend the program must present the information to their organization following attendance of the training program.

For more information, visit the Dean of Students website.

Annual Registration

All sponsored and registered organizations are required to register their organization with the Dean of Students Office at the end of the spring semester. Pharmacy Council assists with this process via streamlining payment. See below for specific registration steps. Note, the $20 fee cannot be paid via Dean’s Allocation funds. 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/  

To complete the Annual Registration, process each April, follow steps 1-4:

2. Go to your student organization's page and click on the "Register" button. It will appear on the far right your organization's name.
3. Complete steps 1-7 and submit.
4. Send the Account number (fundraising or gift) for the $20 fee to the Pharmacy Council Financial Director who will then provide the information to the DOS office.

If there is an issue within your registration application, Student Activities will return your submission through HornsLink. Approval is not automatic until it is officially approved by Student Activities staff. Please allow 2-3 business days for processing. The University's Institutional Rules require all student organizations to register annually. If you have any questions, please contact the Student Organization Center at 512-471-3065.
Screening Activities and Project Collaborate

Due to the COVID-19 pandemic, in-person screening activities are likely to be vastly restricted. Please contact Dean Duhon for approval prior to any screening commitments.

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. Failure to comply with these procedures may prohibit the organization’s participation in future events.

Notification of Dean’s Office & Dean of Students with Semester Activities, Speakers, etc.

Completion of Event Forms are still required for virtual activities/speakers.

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. All COP organization events must be pre-approved by each organization’s faculty advisor. At the beginning of each semester (fall and spring), please utilize the Event Form Qualtrics: https://utexas.qualtrics.com/jfe/form/SV_4UiDNCKPFeS0XoF to submit all events. All events for fall 2020 must be submitted by 9/4/20 for Sept/Oct events, 11/6/20 for Nov/Dec events; all events for spring 2021 events must be submitted by 1/29/21.

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 updated wordmarks in line with university branding. 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. Nick Nobel’s contact information is as follows:

Nick Nobel, communications coordinator: (512) 232-1769; nobel@utexas.edu

Student Promotions 2020-2021

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 Nick Nobel, communications coordinator, via email at nobel@utexas.edu. It is appropriate to use the mark for student organization products, student business cards, posters/displays and other opportunities for identifying yourself or your organization as a representative of the UT College of Pharmacy. Current inventory of products/business cards/and other materials displaying the old mark may still be used.

Products

NO IN-PERSON SALES OR DISTRIBUTION ALLOWED AT THIS TIME

Student organizations wishing to produce promotional items for sale/distribution must secure written approval of their intended artwork/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 Nick Nobel, communications
coordinator, at nobel@utexas.edu. Remember to do this prior to giving your vendor approval for production.
If your design does not have this approval, you will not receive funding. Once you have an email from Nick
Nobel 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 one business day.
Trademark Licensing requires at least two business days 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.

You do not require trademarks approval if your student organization uses a design that does not incorporate
UT or College of Pharmacy branding. It stills requires approval from your faculty advisor and Pharmacy
Council.

When submitting to the Dean’s Office, please be sure to attach approval by Nick Nobel, as applicable.

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 download high-resolution wordmark files on
the college’s Visual Identity page (https://pharmacy.utexas.edu/faculty-staff/college-wordmark/).

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 advanced permission
from the communications 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.
Forms

Electronic Submissions are the only accepted method of submission of forms and documents during the 2020-21 Academic Year

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. You may also find what you need on the College of Pharmacy website under Links and Documents.
**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.

- **Student Organization:**
- **Account to Be Charged:**
- **Form Prepared by:**
- **Email:**
- **Phone Number:**
- **Today’s date:**
- **Name of Faculty Advisor:**

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<th>Event Location:</th>
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<td>Names of Attendee(s): (if 10 or less)</td>
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</table>

**Approximate number attending:** (for groups of more than 10)

**Purpose of the event:**

**Benefit to The University of Texas:**

- **Estimated Cost:**
- **Actual Cost:** (to be filled out by Business Office)

**Average Cost per Person:**

- **or**
- **Average Cost per Person Not Required**

Average cost per person is not required when there is a negotiated agreement with a vendor for a total package price that includes food and non-food expenses. The agreement/contract must be included with the payment voucher.

**Justification if average cost per person is exceeded or if alcohol is the primary expenditure.** (Requires dean, vice president, or vice president equivalent approval below. Official delegates may not approve these exceptions.)

- **Check the following boxes if applicable to your event:**
  - **Contract Required?**
  - **Contract Attached?**
  - **Recurring Event?**
  - **If checked, select frequency:**
    - Weekly
    - Bi-Weekly
    - Monthly
    - Yearly
  - **Vendor(s):**
  - **Charge to ProcCard?**
    - Yes
    - No
  - **Amount for Food:**
  - **Amount for Other:**

**Explain what funds are to be spent on:**

**Requested by:**

**Date:**

**Advisor Signature**

**Approved:**

**Date:**

Debra Madden/Dean M. Lynn Crismon
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 Hee</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 event.

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” OOEF’s needs to know the estimated expenses for the event so that they can make an educated decision whether or not to approve the OOEF 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.
## PROCARD COVER SHEET

<table>
<thead>
<tr>
<th>Account No:</th>
<th>Authorized Signature on Acct:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name:</td>
<td>Printed Name:</td>
</tr>
<tr>
<td>Requestor/End-User Name:</td>
<td></td>
</tr>
<tr>
<td>ProCard User/Order placed by:</td>
<td>Date product(s) will arrive/arrived</td>
</tr>
<tr>
<td>Transaction Date</td>
<td></td>
</tr>
<tr>
<td>Vendor name and Contact info</td>
<td></td>
</tr>
</tbody>
</table>

### Items Purchased/Description | Price
---|---

<p>| | | |</p>
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### Additional Notes: | Subtotal |
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<tr>
<td></td>
<td>Unallowable Tax</td>
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</tbody>
</table>

If using a Dean’s account, state the purpose of item(s)/associated college event: Shipping

**Total**

#### For Student Organization Use Only

Name of Student Organization:

<table>
<thead>
<tr>
<th>Requestor Contact Name:</th>
<th>Email:</th>
<th>Phone:</th>
</tr>
</thead>
</table>

**Business Office Use Only**

<table>
<thead>
<tr>
<th>DTN:</th>
<th>Doc ID #:</th>
</tr>
</thead>
</table>

Updated 8/9/17
# Purchase Request Form

**Account #:** ________________________________  
**Req. #:** ________________________________

**Date:** ________________  
**Purchase Order #:** ________________________________

**Requestor Name:** ________________________________  
**Order Confirmation #:** ________________________________

**Requestor Phone #:** ________________________________  
**Requestor E-Mail:** ________________________________

**Professor /PI or Advisor Name:** ________________________________  
**Authorized Signer on Account:** ________________________________

**Name of Student Organization (if applicable):** ________________________________

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description (Catalog number, description of item, special instructions)</th>
<th>Qty</th>
<th>Unit (Case, Each, Pkg)</th>
<th>Per-Unit Price</th>
<th>Line Item Price (Quantity x Unit price)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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</tbody>
</table>

**IF ORDERING CHEMICALS, ARE THE CHEMICALS HAZARDOUS**  
**YES**  
**NO**

<table>
<thead>
<tr>
<th>Subtotal</th>
<th>Handling Fee</th>
<th>Shipping</th>
</tr>
</thead>
</table>

**EXPRESS SHIPPING**  
**YES**  
**NO**

**Order Total:** ________________________________

**Complete Name of Vendor:** ________________________________  
**Vendor Contact Name:** ________________________________

**Vendor’s Address:** ________________________________  
**Quote Number:** ________________________________  
**Date:** ________________________________

**Vendor’s Phone Number:** ________________________________  
**Vendor’s email address:** ________________________________
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: ______________________________
# Texas Sales and Use Tax Resale Certificate

<table>
<thead>
<tr>
<th>Name of purchaser, firm or agency as shown on permit</th>
<th>Phone (Area Code and number)</th>
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<tbody>
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<tr>
<th>Address (Street S number, P.O. Box or Route number)</th>
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<table>
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<tr>
<th>City, State, ZIP code</th>
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<table>
<thead>
<tr>
<th>Texas Sales and Use Tax Permit Number (must contain 11 digits)</th>
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</table>

<table>
<thead>
<tr>
<th>Out-of-state retailer's registration number or Federal Taxpayers Registry (RFC) number for retailers based in Mexico</th>
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</table>

(Retailers based in Mexico must also provide a copy of their Mexico registration form to the seller.)

---

I, the purchaser named above, claim the right to make a non-taxable purchase (for resale of the taxable items described below or on the attached order or invoice) from:

<table>
<thead>
<tr>
<th>Seller:</th>
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<table>
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<tr>
<th>Street address:</th>
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<table>
<thead>
<tr>
<th>City, State, ZIP code</th>
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</table>

**Description of items to be purchased on the attached order or invoice:**

<table>
<thead>
<tr>
<th>Description of items to be purchased on the attached order or invoice:</th>
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</table>

**Description of the type of business activity generally engaged in or type of items normally sold by the purchaser:**

<table>
<thead>
<tr>
<th>Description of the type of business activity generally engaged in or type of items normally sold by the purchaser:</th>
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The taxable items described above, or on the attached order or invoice, will be resold, rented or leased by me within the geographical limits of the United States of America, its territories and possessions or within the geographical limits of the United Mexican States, in their present form or attached to other taxable items to be sold.

I understand that if I make any use of the items other than retention, demonstration or display while holding them for sale, lease or rental, I must pay sales tax on the items at the time of use based upon either the purchase price or the fair market rental value for the period of time used.

I understand that it is a criminal offense to give a resale certificate to the seller for taxable items that I know, at the time of purchase, are purchased for use rather than for the purpose of resale, lease or rental, and depending on the amount of tax evaded, the offense may range from a Class C misdemeanor to a felony of the second degree.

<table>
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<th>Purchaser</th>
<th>Title</th>
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This certificate should be furnished to the supplier. Do **not** send the completed certificate to the Comptroller of Public Accounts.
**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>
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<tr>
<th>Item #</th>
<th>Quantity</th>
<th>Description</th>
<th>Page #</th>
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Name of Organization: ___________________________ Abbreviate: ______

Name of Student ordering: ___________________________

Student Phone #: _________________________________

Student E-mail: _________________________________

Account to be Charged: ____________________________

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:

________________________________________________________

________________________________________________________

________________________________________________________
# Request for Authorization

**Student Travel: University Organized or Sponsored Events**

**The University of Texas at Austin**

## Part I. Requestor/Sponsor Information

- **Name of University Employee Responsible for Trip:**
- **Position/Title:**
- **Administrative Unit/Organization:**
- **Phones:** Office ___________ Cell ___________ Email ___________

## Part II. Trip Information

- **Purpose of Trip:**
- **Destination:**
- **Dates of Travel:** Departure ___________ Return ___________
- **Total Number of Participants:** ___________ **Number of Non-Student Participants:** ___________
- **Lodging Arrangements:** Address and Phone Number Required
  - Phone (___)
- **Transportation Arrangements:**
  - **Vehicle:** Rental Car □ Personal Car □ Van □ UT Owned/Leased Vehicle (circle one)
  - **Common Carrier:**
  - **Name(s) of Drivers:**
  - **Name of University Employee Available for Contact in Event of Emergency:**
  - **Phones:** Office ___________ Home ___________ Cell ___________

## Part III. Administrator Approval

**Required Information/Documents:**
- List of All Participants/Emergency Contacts □ Release/Indemnification Agreements □
- Proof of Medical Insurance □ Medical/Emergency Treatment Authorization Forms □
- Valid Driver's License, if applicable □
- Proof of Current Liability Insurance (For Personal Vehicle Use Only) □

**Approval Signature**

- **Title:**
- **Date:**

---

6/18/02
THE UNIVERSITY OF TEXAS AT AUSTIN

Release and Indemnification Agreement – Adult Student

STUDENT: ___________________________________ UT EID: __________________

Name (last name first - please print or type)

Address

City, State, Zip Code

DESCRIPTION OF ACTIVITY OR TRIP: ________________________________________

________________________________________________________________________

MODE OF TRANSPORTATION: _____Auto (Driver) _____Auto (Passenger) _____Airplane _____Bus

LOCATION(s) of activity or trip:

DATE(s) of activity or trip: FROM ___________________ 20__ TO ___________________ 20__

I, the above named student, am eighteen years of age or older and have voluntarily applied to participate in the above Activity or Trip. I acknowledge that the nature of the Activity or Trip may expose me to hazards or risks that may result in my illness, personal injury or death and I understand and appreciate the nature of such hazards and risks.

In consideration of my participation in the Activity or Trip, I hereby accept all risk to my health and of my injury or death that may result from such participation and I hereby release the University of Texas at Austin, its governing board, officers, employees and representatives from any and all liability to me, my personal representatives, estate, heirs, next of kin, and assigns for any and all claims and causes of action for loss of or damage to my property and for any and all illness or injury to my person, including my death, that may result from or occur during my participation in the Activity or Trip, whether caused by negligence of the University of Texas at Austin, its governing board, officers, employees, or representatives, or otherwise. I further agree to indemnify and hold harmless the University of Texas at Austin and its governing board, officers, employees, and representatives from liability for the injury or death of any person(s) and damage to property that may result from my negligent or intentional act or omission while participating in the described Activity or Trip.

I HAVE CAREFULLY READ THIS AGREEMENT AND UNDERSTAND IT TO BE A RELEASE OF ALL CLAIMS AND CAUSES OF ACTION FOR MY INJURY OR DEATH OR DAMAGE TO MY PROPERTY THAT OCCURS WHILE PARTICIPATING IN THE DESCRIBED ACTIVITY OR TRIP AND IT OBLIGATES ME TO INDEMNIFY THE PARTIES NAMED FOR ANY LIABILITY FOR INJURY OR DEATH OF ANY PERSON AND DAMAGE TO PROPERTY CAUSED BY MY NEGLIGENCE OR INTENTIONAL ACT OR OMISSION.

Signature of Student ___________________ Date signed: ___________________ 20__

Signature of Witness ___________________ Date signed: ___________________ 20__

Printed Name of Witness

Form: ADULT STUDENT - Revised 10/96
THE UNIVERSITY OF TEXAS AT AUSTIN

Authorization for Emergency Medical Treatment – Adult
(For Persons Eighteen Years of Age or Older)

I. MEDICAL INFORMATION (please type or print legibly)

a. Name ____________________________ (last, first, middle)
   Address ____________________________ (street or P.O. box, city, state, zip code)
   Telephone Number: Day __________ Night __________

b. Name of Nearest Relative ____________________________ (last, first, middle)
   Address ____________________________ (street or P.O. box, city, state, zip code)
   Telephone Number: Day __________ Night __________

c. Physician’s Name ____________________________
   Full Address ____________________________
   Telephone Number: Office __________ Emergency __________

d. Dentist’s Name ____________________________
   Full Address ____________________________
   Telephone Number: Office __________ Emergency __________

e. Health Insurance Company Name ____________________________
   Policy Number ____________________________ Telephone ____________________________

f. Allergies __________________________________
   g. Current Medications ____________________________
   h. Special Health Needs ____________________________

II. EMERGENCY MEDICAL AUTHORIZATION

I, the undersigned, do hereby authorize The University of Texas at Austin and its agents or representatives to consent, on my behalf, to any medical/hospital care or treatment (including locations outside the U.S.) to be rendered upon the advice of any licensed physician. I agree to be responsible for all necessary charges incurred by any hospitalization or treatment rendered pursuant to this authorization.

The effective dates of this authorization are:

_______________________ 20__ to _______________________ 20__.

I am eighteen years of age or older, have read the above authorization, and confirm that the information contained therein is true and accurate.

_________________________________ Date: ____________ 20__

(Signature of Individual Providing Authorization)
Travel Information: Hotel & Transportation

Lodging:

Hotel name: ____________________________________________

(OR name of family member you are staying with)

Address: ____________________________________________

City & State: ________________________ Phone: ____________

Travel Information / Method of Transportation:

Date of Departure: ________________________ Date of Return: ________________________

*Flying:

Airline: ____________________________________________ Copy of Itinerary Attached (required)

DEPARTURE RETURN
Flight #: Flight #: ____________________________
To: From: ____________________________
Departure Time: ____________________________ Departure Time: ____________________________
Departure City: Departure City: ____________________________
Layover City: Layover City: ____________________________
Arrival Time: Arrival Time: ____________________________
Arrival City: Arrival City: ____________________________

*Bus:

Bus line: ____________________________

DEPARTURE RETURN
Route #: Route #: ____________________________
To: From: ____________________________
Departure Time: Departure Time: ____________________________
Departure City: Departure City: ____________________________
Layover City: Layover City: ____________________________
Arrival Time: Arrival Time: ____________________________
Arrival City: Arrival City: ____________________________

*Auto:

_____ I am a Passenger in car driven by ____________________________

_____ Driver (If you are not on the policy or 25 or older, you cannot drive.)

Drivers – Attached (must be turned in all together):

_____ Copy of Driver’s license for each driver (includes back up drivers)

_____ Copy of current liability insurance for car (expired date NOT accepted)

_____ Inspection Sticker has been verified or witnessed by the organizations Vice-

president/UT College of Pharmacy Faculty member

_____ Completed verification form signed & dated by witness or faculty member

_____ Names of all passengers in car (student and non-student)

__________________________________________

__________________________________________
THE UNIVERSITY OF TEXAS AT AUSTIN

Required Emergency Contact Information Form

(We need both the Attendee and Emergency Contact name, complete address and phone numbers)

Name of Attendee: ____________________________

Local Address: ________________________________

__________________________________________

Permanent Address: __________________________

__________________________________________

Phone Number: Day: __________________________

Night: ________________________________

Cell: ________________________________

Name of Emergency Contact: ____________________

Local Address: ________________________________

Phone Number: Day: __________________________

Night: ________________________________

Cell: ________________________________
To: Tristan D’Artagnan – Business Office PHR 5.114

Subject: Travel Scholarship

On behalf of the College of Pharmacy and the ____________________________, it is our pleasure to inform you that you have been awarded a $________________________scholarship 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.

______________________________________________
TRAVEL SCHOLARSHIP

Please complete the following within 2 weeks of returning from your meeting. Travel scholarship $________________________

Meeting Attended: ____________________________

Dates of Meeting: ____________________________

City and State of meeting/event: ____________________________

Print Your Name: ____________________________

UT EID: ____________________________

Your Contact Phone #: ____________________________

Current Address: ____________________________

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

Student Signature ____________________________

Advising Professor’s Signature ____________________________

Funding Section

| Research Day Travel | Dean’s Allocation (Business Ofc) Acct# ____________________________ |
| Leadership Travel | Student Org Fundraising Acct# ____________________________ |
| PharmD Research Travel | Student Org Gift Acct# ____________________________ |
| Walgreen’s Diversity | Other Acct# ____________________________ |
| Other |

REVISED 7/6/2018
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?