UTDesign Student Purchase & Reimbursement Overview

(Process: https://utdesign.utdallas.edu/resources/forms-templates)

Start

- Determine which parts are needed, find appropriate vendors
  - Within budget?
    - Yes
      - Proceed to next step
    - No
      - Decide on software or server service?
        - Yes
          - Proceed to next step
        - No
          - Request for small, inexpensive items?
            - Yes
              - Proceed to next step
            - No
              - Requires Faculty Advisor (FA)/Technical Mgr (TM) approval?
                - Yes
                  - Proceed to next step
                - No
                  - Proceed to next step

- Guide students to find the best solutions
  - Update project budget if requisition was approved

- Faculty Advisor (FA)/Technical Mgr (TM)
  - Initiate reimbursement requisition in eProcurement
  - Review requisition
    - Approved?
      - Yes
        - Proceed to next step
      - No
        - Proceed to next step
  - Process requisition and initiate payment process
  - Inform student

- UTDesign Administration
  - Set up student as vendor in payment system

- eProcurement / Vendor Group
  - Send PaymentWorks invitation to student

- Complete entire Reimbursement Form. One form per student
  - Send reimbursement form and scanned receipts to FA/TM for approval
  - Approve?
    - Yes
      - Proceed to next step
    - No
      - Proceed to next step

- Inform student about needed changes
  - Submit update project budget request

- Fill out and complete PaymentWorks information
  - Need FA/TM approval?
    - Yes
      - Proceed to next step
    - No
      - Proceed to next step

- UTDesign Student
  - Purchase items. Collect and scan itemized receipts
  - Within budget?
    - Yes
      - Proceed to next step
    - No
      - Follow UTDesign Procurement Flow

- End