UTDesign Student Reimbursement Process

**UTDesign Student**
- **Start**
  - Determine which parts are needed, find appropriate vendors
  - **Within budget?**
    - **Yes**
      - Guide students to find the best solutions
      - **Software or server service?**
        - **Yes**
          - **Student purchase?**
            - **Yes**
              - Complete entire Reimbursement Form (One form per student)
              - **Submit reimbursement form and scanned receipts for approval**
            - **No**
              - **Yes**
              - Update Reimbursement form as requested
              - **Need FA/TM approval?**
                - **Yes**
                  - Fill out and complete PaymentWorks information
                  - **Inform student about needed changes**
                - **No**
                  - Inform student about needed changes
                  - **Update project budget if requisition was approved**
                  - **End**
  - **No**
    - **Yes**
      - **Small, inexpensive item?**
        - **Yes**
          - **Purchase items. Collect and scan itemized receipts**
          - **Complete entire Reimbursement Form (One form per student)**
          - **Submit reimbursement form and scanned receipts for approval**
          - **Inform student about needed changes**
          - **Update Reimbursement form as requested**
          - **End**
        - **No**
          - **Yes**
          - **Inform student about needed changes**
          - **Submit reimbursement form and scanned receipts for approval**
          - **Inform student about needed changes**
          - **End**
      - **Yes**
        - **Inform student about needed changes**
        - **Submit reimbursement form and scanned receipts for approval**
        - **Inform student about needed changes**
        - **End**
      - **Inform student about needed changes**
      - **Inform student about needed changes**
      - **End**

**Faculty Advisor (FA)/Technical Mgr (TM)**
- **Guide students to find the best solutions**
- **Within budget?**
  - **Yes**
  - **No**
    - **Yes**
      - **Software or server service?**
        - **Yes**
          - **Student purchase?**
            - **Yes**
              - Complete entire Reimbursement Form (One form per student)
              - **Submit reimbursement form and scanned receipts for approval**
            - **No**
              - **Yes**
              - Update Reimbursement form as requested
              - **Need FA/TM approval?**
                - **Yes**
                  - **Fill out and complete PaymentWorks information**
                  - **Inform student about needed changes**
                - **No**
                  - Inform student about needed changes
                  - **Submit reimbursement form and scanned receipts for approval**
                  - **Inform student about needed changes**
                  - **End**
          - **Yes**
          - **Inform student about needed changes**
          - **Inform student about needed changes**
          - **End**
      - **Yes**
      - **Inform student about needed changes**
      - **Inform student about needed changes**
      - **End**
    - **No**
      - **Yes**
      - **Inform student about needed changes**
      - **Inform student about needed changes**
      - **End**

**UTDesign Administration**
- **End**
- **Submit reimbursement form and scanned receipts for approval**
- **Inform student about needed changes**
- **Inform student about needed changes**
- **End**
- **Inform student about needed changes**
- **End**
- **Inform student about needed changes**
- **End**
- **Update Reimbursement form as requested**
- **Need FA/TM approval?**
  - **Yes**
    - **Fill out and complete PaymentWorks information**
    - **Inform student about needed changes**
    - **Submit reimbursement form and scanned receipts for approval**
    - **Inform student about needed changes**
    - **End**
  - **No**
    - **Yes**
    - **Inform student about needed changes**
    - **Inform student about needed changes**
    - **End**

**eProcurement / Vendor Group**
- **End**
- **Set up student as vendor in payment system**
- **Review requisition**
  - **Approve?**
    - **Yes**
      - **Inform student**
      - **Process requisition and initiate payment process**
      - **End**
    - **No**
      - **End**
- **Initiate reimbursement requisition in eProcurement**
  - **Inform student**
  - **Process requisition and initiate payment process**
  - **End**
- **Inform student**
  - **Process requisition and initiate payment process**
  - **End**

UPM tool: [http://utdesign-procurement.utdallas.edu](http://utdesign-procurement.utdallas.edu)

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