

Entertainment & Events Request Official Occasion Expense Form

Revised: 5/2018



The University of Texas at Austin

Dell Medical School

Event ID _____

INSTRUCTIONS: Departments must complete all sections of this form at least 10 business days in advance as a request to hold an event, on or off campus. Receiving all signature approvals will consent the due diligence effort to get all contracts and agreements in order for the event. Submit form to DellMedFinance@austin.utexas.edu to be routed through the proper channels.

Section 1: Department Information

Department: <u>Department within Dell Medical School.</u>	Requester: <u>Name of person completing the form. This will be the go-to contact for any questions regarding event.</u>	Date: <u>Date completing form.</u>
Account Number: <u>Must be local/gift/discretionary account. No AUF funding can be used for entertainment expenses.</u>	Payee (Optional): <u>If reimbursing an individual, indicate name and EID. If paying a company, indicate name of vendor.</u>	

Section 2: Event Information

Event Name: <u>Summary of event.</u>		Vendors to be used: <u>List all companies/individuals to be paid for expenses incurred during event.</u>
Event Date: <u>List specific date or date range of event. If blanket, input start & end date.</u>	Event Time: <u>Indicate beginning & end time of event.</u>	Event Location: <input type="checkbox"/> HLB <input type="checkbox"/> HTB <input type="checkbox"/> HDB <input type="checkbox"/> DPRI <input type="checkbox"/> Other _____ <u>Indicate location where event takes place. List all if more than one location. If event did not take place in Austin, TX, identify city and state.</u>
Event Object Code: <u>Check one to indicate event type.</u>	<input type="checkbox"/> Official Occasion or Admin./Business Meeting (1347) <input type="checkbox"/> Official Student Event (1309) <input type="checkbox"/> Flowers or other Perishable Items for Individuals (1329)	Name of Group attending if >10: <u>If 11 or more people will be attending, supply a general description of people.</u> <input type="checkbox"/> Check this box if the hosting unit's chief administrator (provost, dean, vice president, or vice president equivalent) attended a non-university-wide event, and record name in the space provided below: <u>If Clay Johnston is hosting the event and it's a non-university-wide event, check this box and list his name here.</u>

Actual Cost: <u>Fill out if the OOEf request is after-the-fact or when submitting for payment.</u>	Actual Number of Participants: <u>Fill out if the OOEf request is after-the-fact or when submitting for payment.</u>	Actual Average cost per Person: <u>Fill out if the OOEf request is after-the-fact or when submitting for payment.</u>
--	--	---

Name	Title	Affiliation	Name	Title	Affiliation
<u>If 10 or fewer are planning to attend, list participant's name, title and affiliation.</u>					

Purpose of the event: Supply a detailed explanation of the purpose of the event including all parties involved along with a brief agenda and what meals will be provided. Must include why requested entertainment expenses are required.

Benefit to the Dell Medical School and the University: Supply a detailed explanation of how the event is expected to benefit the Dell Medical School and the University or the benefits actually derived from the event.

Justification if cost per person is exceeded or if alcohol is primary expenditure: <u>The average per person entertainment limit for breakfast & lunch is \$30 and dinner is \$75 which includes food, alcohol, tax, and gratuity. The alcohol entertainment limit is 50% or less of the subtotal. An explanation must be provided if the limits are exceeded.</u>	<input type="checkbox"/> Alcohol approval attached to serve alcohol on UT property <u>If applicable, this is required before the event.</u>
--	--

Section 3: Budget Information

Total Requested Budget: <u>Indicate total amount requested for the event. Food, Space, AV and Other costs below should add up to this amount.</u>		Contracts/Agreements Required? <input type="checkbox"/> Yes <input type="checkbox"/> No <u>Indicate YES if event requires catering, venue rental, guest speakers, photography/videographer, or any other agreements.</u>	
Food Cost: <u>Should include all consumable good purchases including but not limited to catering, house accounts, grocery store trips with the pro-card, UTMarket orders, etc...</u>	Space Cost: <u>Cost of venue rental, on and off campus.</u>	A/V Cost: <u>Cost of all A/V rentals, supplies.</u>	Other Costs: <u>Indicate any other costs to hold the event (honorarium, facilities, parking, etc.).</u>

Entertainment & Events Request Official Occasion Expense Form

Revised: 5/2018



The University of Texas at Austin

Dell Medical School

Event ID _____

Estimated Number of Participants: Expected number of attendees if event has not happened yet.	Estimated Average cost per person: Food cost divided by the estimated number of participants if event has not happened yet.	<input type="checkbox"/> Average Cost per Person not required. Check if 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 OOEf request before the event.
---	---	---

Section 4: Approval Signatures

A review of this proposal has been performed. Finance will perform appropriate budget check and inform requestor of approval.

Requestor Signature of the person completing this form.	Printed Name:	Date:
Admin. Delegate/Dept. Head Signature of Dept. Head or Admin Delegate - see delegation of signature approval table via DMS wiki.	Printed Name:	Date:
Asst. Director for Special Events Special events will require this level of approval for awareness and planning. Facilities will route request to Asst. Director.	Printed Name: Amanda Tofflemire	Date:
Facilities (If held at a Dell Med facility) Facilities' approval is required depending on the nature of the event. Finance will route request to Facilities if applicable.	Printed Name: Daniel Heath	Date:
Director of Finance (For events < \$10,000) Finance will vet, sign and send through proper channels if event is approved.	Printed Name: Susie Scheffler	Date:
Chief Administrative Officer (For events > \$10,000) Finance will vet and acquire signature approval for events >\$10,000.	Printed Name: Dwain Morris	Date:
Additional Approval (if necessary) Finance will vet and acquire signature approval for events over \$100K from the CBO and/or Dean. Exceptions are given on a case-to-case basis.	Printed Name:	Date: