Faculty Purchasing & Travel

Are you an Educational Psychology faculty member wishing to purchase something with UT funds? If so, please follow the steps below!

**Important:** Faculty must obtain prior approval from EDP **before** making any purchases/hires or traveling. Purchase and travel requests must be submitted a minimum of 2 weeks in advance, and Service for Hire and Faculty Travel Grant requests must be submitted at least 4 weeks in advance.

EDP is very rarely able to pay/reimburse without prior approval, and UT has very stringent rules around how travel, purchases and contracts must be handled.

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**Step 1: Determine funds to use**

If you do not know which account to use or if funds are available, contact Nicole Landes.

**Step 2: What kind of request is it?**

Specific instructions for different request types are below.

**Travel Instructions**

**All UT faculty and staff must submit Travel Requests for any travel (personal or work) while on active appointment. Weekend-only domestic personal travel does **not** require a travel request.**

Travel requests be submitted a minimum of 2 weeks prior to departure, and Faculty Travel Grant requests at least 1 month prior to departure.

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**Step 1: Who will be paying for the trip?**

If using a UT account, you will need the account #. If you do not know your account #, contact Julie Nguyen.

**Step 2: Submit the Travel Request Form**

Fill out a **Travel Request Form** and "assign" it to Julie Nguyen.

**Using a Faculty Travel Grant?**

If so, you must complete a **Faculty Travel Grant Application** AND **Travel Request Form**. Both forms must be completed at the same time and "assigned" to Julie. Faculty Travel Grant requests **must be submitted at least 1 month prior to travel** due to a lengthy approvals process.

**Important Note RE: Phased Retired faculty using Faculty Travel Grants:**

As of September 1, 2019 Phased Retirement faculty will be eligible for the Graduate School’s Faculty Travel Grant ($1,200) but are not eligible to receive the additional $1,000 supplement that historically came from the College of Education.

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**Step 3: Approval**

EDP will obtain approvals and contact you with any questions.

When approved, you’ll receive a notification email with your RTA and DOC ID #s.

*Note: For Faculty Travel Grants, approval comes in the form of 2 emails - the 1st is general approval to travel (RTA), the 2nd is approval for use of Faculty Travel Grant funds.*

**Step 4: Book your travel!**

**Flights:** If a UT account will be used to pay for the trip, we recommend booking via UT’s **Concur** system or by calling one of UT’s Travel Agencies so the charges can be direct-billed to UT. You’ll just need your RTA and DOC ID #s from your confirmation email to book.

*Note: Flights booked yourself online through the airline are reimbursable (after your trip), but NOT flights booked through non-UT travel agencies.*

**Hotel:** Lodging is reimbursement-only.
**Rental Cars**: If a UT account will be used to pay for the trip, you can either book your rental car and turn in receipts after your trip for reimbursement, or see [how to direct-bill rental cars here](#).

**Step 5: Submit your receipts**

If UT is paying for any of your travel, you must submit **itemized receipts** to Julie for processing **within 30 days of your return**. Be sure to include receipts for anything direct-billed as well (e.g. flights):

- Receipts must be itemized.
- **Meal reimbursements**: the department reimburses based on current per-diem meal rates, so it is not necessary to submit meal receipts. Please note that a partial per-diem applies for partial-day travel (e.g. evening departures / morning returns).
- **Lodging**: hotel bills must be itemized and show your name, rate for single occupancy, and the dates applicable to the approved travel. If sharing a room, your bill must show your name and charges only.

**Note**: we recommend setting up Direct Deposit for reimbursements. This is separate from payroll Direct Deposit.

**Travel Resources**

**Concur Login**

**International Travel**
Per the Chancellor's 2010 directive, any international travel reservations made through sources other than Concur or a contract UT agency (Anthony Travel / Corporate Travel Planners) must be entered by the faculty member into the ISOS database.

**Submit a Travel Request**
A Travel Request Form must be submitted in advance for each absence of a faculty member from regular duties (HOP 7.28).

**Travel Management Services (TMS)**

**Travel Planning**

**Travel Reimbursements Policies & FAQ**

**Travel Request Policies & FAQs**

**Paying someone for Services / Work**

Fill out the Form below and send to Julie Nguyen a minimum of 4 weeks prior to any services/work occurring.

**IMPORTANT**: UT and the COE Dean’s Office require prior approval for services before any work has begun. Except in very rare circumstances, EDP cannot pay for services without prior approval.

**Equipment Purchasing**

To purchase computers or other technology with University funds:

1. Send a help request to ITO at help@edb.utexas.edu requesting assistance in choosing and purchasing equipment. Include the following:
   a. Specifics about what you need
   b. Budget
   c. What the equipment will be used for (teaching, research, other)
   d. Where the equipment will be kept
2. ITO will work with you to find equipment that meets your needs
3. Once the equipment has been settled on, ITO will send the purchase request to EDP
4. EDP will contact you with any follow-up questions
5. Equipment will be delivered to ITO. ITO will contact you when the equipment is ready to be set up.
Equipment Purchasing FAQs

Faculty replacing their teaching computer will be given a budget when they are informed of their upgrade eligibility.

Faculty are encouraged to keep track of their funding sources and expenditures for any other type of purchases. If you are not sure how much money you have available for purchasing equipment, please contact Nicole Landes.

If you are having difficulties with your equipment or suspect it’s broken, please send a help request to ITO first so that they can determine whether it’s worth repairing your equipment or best to purchase a new one.

Tenured/Tenure-Track faculty will receive one computer from the department to be used for teaching. This teaching computer is eligible for upgrade every 4 years. Faculty eligible for upgrade will receive an email notice from the department when it is time to choose a new computer.

Faculty are welcome to purchase equipment with other funds available to them, as long as purchases fall within the fund/UT purchasing guidelines. The purchasing process for these is the same one outlined at the top of this page.

ITO can assist you in selecting equipment that fits your needs. Start the process by sending a help request to ITO at help@edb.utexas.edu.

If you do not have access to email on any of your devices, you can submit your request to ITO by telephone at (512) 471-4357.

Contact Julie Nguyen if you have other equipment purchasing questions not already addressed on this webpage.

Software/Licenses

Email Julie Nguyen with:

1. The software or license you wish to purchase/renew
2. If it will be used for your regular job duties/teaching or for research
3. What funds you plan on using

Office Supplies for Teaching

Be sure what you’re needing isn’t already available in the EDP main office. If not, email Julie Nguyen and let her know what you need (please be as specific as possible).

Office supplies for Research

Email Julie Nguyen and let her know what you need (with as much detail as possible), and what funds you wish to use.

Food/Beverage Purchases

Food and beverage purchasing often takes special paperwork due to UT “entertainment” purchasing rules. To purchase food/beverages for an event, meeting, or for other UT-related purposes, contact Julie Nguyen.

Assessments Purchases

Fill out the EDP Order Form and email it to Julie Nguyen.

Other Purchases

Email Julie Nguyen with a description of what you wish to purchase and what funds you plan on using.

FAQs

Detailed University-level Policies & Procedures can be found in the University of Texas Handbook of Business Procedures. Note: COE and EDP may have college and department-level procedures in addition to UT procedures.

Yes. The general rule of thumb for prior approval notice is 2 weeks minimum. Please see the steps above to determine how to submit your purchase requests. Two exceptions:

- If you have your own Department-issued ProCard, check with EDP when you receive your ProCard to determine what kinds of purchases you can make without prior approval.
- If extenuating circumstances (e.g. emergencies) prevent you from obtaining prior approval, UT may be able to grant a one-time exception, but this is not guaranteed (see late request policy below).

A request outside the prior approval timeframe (4 weeks in advance for service-for-hire and Faculty Travel Grant requests, 2 weeks for all other purchasing/travel) requires an explanation memo from the faculty member. The memo must be submitted via email to Julie Nguyen, who will obtain the necessary approvals before proceeding with the request.
All late requests require EDP Chair approval; depending on request type and timing, additional approvals may be needed. Late requests are not always approved - it is therefore important all requests be made within the required prior approval timeline.

Explanation Memo for Late Purchase/Service/Travel Requests (Required):

Faculty are encouraged to keep track of their funding sources and expenditures for all purchases. If you are not sure how much money you have available, please contact Nicole Landes.

Funding sources often depend on the type of purchase. If you’re not sure which to use, please contact Nicole Landes.

Contact Nicole Landes if you have other questions not addressed on this webpage.