



4.3 Field Trips

Policy Statement

Purchases for Field Trips may need special permission granted by the Procurement Officer when such purchases cannot be made utilizing normal purchasing policies and procedures. Please note that most field trips involve research and employee travel, and this policy does not apply to student excursions which could be classified as a "field trip".

Reason for policy

To provide guidance on how to obtain permission to purchase goods and services required when University employees make field trips and where such purchases cannot be made utilizing the normal purchasing policies and procedures as described elsewhere in this manual.

Procedures

From time to time, University employees need to make field trips related to their University activities. For flexibility in planning and ordering or for other reasons, it may be advantageous to request and obtain special permission to exceed normal petty cash, reimbursable charge, p-card, or payment request purchasing limitations for supplies and equipment while the trip is in progress.

Such requests should be submitted in letter form, signed by the originator, and include the following information:

- Site(s) of field trip;
- Nature of field trip (such as research on a specific project);
- Source of funding and University account numbers;
- General nature of items to be purchased (such as supplies and equipment);
- Any equipment rentals needed and approximate cost;
- Estimated maximum dollar purchase for any given transaction for supplies and equipment (exclude room, board, transportation);
- Estimated maximum dollar purchase for supplies and equipment for the total period involved (exclude room, board, transportation);
- Period to be covered (approximate beginning and ending dates);
- Method of payment contemplated, such as from petty cash funds, p-card or charge via payment request procedures.

Payments: Please allow adequate processing time for all payments. The University incurs costs when funds are wired so please limit requests for wire transfers. Please refer to the [Wire Transfer Policy](#) for more information regarding wire transfers.

Additional contacts

Accounts Payable 706-542-2786

Responsibilities

Responsible University Senior Administrator: Vice President for Finance & Administration

Responsible University Administrator: Procurement Officer

Policy Owner: Procurement
Policy Contact: [Robert Currey](#)
Phone Number: 706-542-2361

Record Retention

Retention for purchase order files may vary by the method of purchase (competitive, sole source, under the competitive bid threshold)

Retention: 5 years, BOR [0472-03-001](#); 7 years BOR [0472-03-009](#)

Related information

Multiple training resources for processing payment requests are available in the OneSource Training Library:

[Creating a Payment Request](#)

[Creating a Payment Request with Multiple Expense Lines](#)

[Creating a Payment Request with Multiple Accounting Distributions](#)

[Editing a Denied Payment Request](#)

[Approving a Payment Request](#)

[Denying a Payment Request](#)

Related Policies:

[Trade Ins](#)

[Conferences](#)

Policy Dates

Effective Date: 01/01/2016

Date Last Updated: 9/26/2019

Date of Last Review: 9/26/2019

Date of Approval:

Previous Version of Policy: