Requesting a Reimbursement

Required backup documentation:

- Itemized receipts, taped on all four sides onto an 8.5” by 11” piece of paper and scanned & attached in PurchasePath (retain originals until you have received your reimbursement).
- If items are for food, a list of attendees must be included.
- If no receipts, a perjury statement must be signed & submitted. Contact your budget manager to request a blank perjury statement form.
- If requesting reimbursement for alcohol it must be in accordance with the Department of Civil and Environmental Engineering alcohol policy. It must also be a separate line item from food and be allocated separately to a 64-xxxx budget, or a grant with alcohol approval (very rare).

Business Purpose: Required

Explains how the purchase benefited the University of Washington.
No essays required, just enough info for someone unfamiliar with your budget, or research in general, to understand how a filter, glue, flash drives, or food benefits the business of UW (which is your research or lab)

Bad Examples:
- I bought this for this grant.
- We decided to celebrate all the work we did and want to charge the grant.
- We bought a baby shower gift and want to charge my salary recapture
- This is alcohol to go to this grant.
- Various items
- Use whichever budget has money

Good Examples:
- I bought this filter for the aquariums used to keep our zebrafish which are used on this grant.
- Food was provided at a lab meeting to discuss current research. In attendance were X,Y,Z,A, and 0 and it is on my non-federal recapture budget.
- Alcohol reimbursement for dinner with faculty recruitment candidate Dr. Witherspoon on discretionary budget 64-xxxx
- This alcohol serves research purpose "Y" on this grant
- Food is necessary for patients who have been fasting and receive blood draws as a part of the protocol on this grant.
- Powdered Milk and colored nail polish are bought for research purposes because the nail polish color is used to code slides and milk powder is used for protein extraction.
General Reimbursement request steps:

1. Log in to PurchasePath
2. Select Reimbursement from down menu. Reimbursement order type will default “Reimbursement” as vendor name. This intentional in order to maintain integrity within the vendor database.

3. Select appropriate “Unit”

4. Click **Continue**.
5. Fill in the fields as directed:

<table>
<thead>
<tr>
<th>Person to be Reimbursed</th>
<th>Name of person requesting reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number</td>
<td>Contact number for any questions</td>
</tr>
<tr>
<td>Direct Deposit</td>
<td>If you are a <strong>UW employee</strong>, check this box (non-UW employees see next field)</td>
</tr>
<tr>
<td>Address to send Check</td>
<td>For <strong>non-UW employees</strong> that do not have Direct Deposit set up, please fill in the mailing address you want to receive your check.</td>
</tr>
<tr>
<td>Number of Attendees</td>
<td>If requesting reimbursement for meal(s), enter the amount of attendees. Otherwise enter “N/A”.</td>
</tr>
<tr>
<td>Business Purpose (REQUIRED)</td>
<td>Explains how the purchase benefited the University of Washington. No essays required, just enough information for someone unfamiliar with your budget, or research in general, to understand how a filter, glue, flash drives, or food benefits the business of the UW.</td>
</tr>
</tbody>
</table>

**SAMPLE**

<table>
<thead>
<tr>
<th>Welcome</th>
<th>Create Order</th>
<th>Products</th>
<th>Pending Orders</th>
<th>Search Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>User: Summer Dela Cruz Parkes</td>
<td>Global Admin: Civil and Environmental Engineering</td>
<td>Quick Search for</td>
<td>Order ID:</td>
<td>Search</td>
</tr>
</tbody>
</table>

Create an Order (step 2 of 3)

Next we need some information about the order:

Please be sure to refer to the Reimbursement (non-travel) Instructions or the Travel Instructions for additional information.

Person to be reimbursed: Summer Dela Cruz Parkes
Phone Number: 206-616-8336
Direct Deposit: 
Address to send Check (If no direct deposit): 
Number of attendees (if applicable): N/A
Business Purpose (and list of attendees if not attached):
I bought this filter for the aquariums used to keep our zebrafish which are used on this grant.

Reminder: Please attach all receipts on the next page and retain all original receipts until reimbursement has been received!

6. Click **Continue**.

7. Click **Add a Line Item**.
8. Enter in the item in the description field and click "Search".

PurchasePath will require you to “search” for products event though they most likely do not exist within the current database. However, once accustomed to stepping through these additional “clicks”, you will be able to move through them quickly without significant impact to the time it takes to create and submit a reimbursement request.

9. Click "Add New Item".

10. In the **Add a product screen**, add as much information as possible. If you do not have this information, click "Add".

![](image1.png)

![](image2.png)

![](image3.png)
11. Fill in fields as directed below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>Enter quantity purchased</td>
</tr>
<tr>
<td>Unit Size</td>
<td>Optional</td>
</tr>
<tr>
<td>Product Category</td>
<td>Scroll thru the list. If category is not listed, select “Unspecified”.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Enter cost (per item) before tax</td>
</tr>
<tr>
<td>Total</td>
<td>Automatically calculates tax</td>
</tr>
<tr>
<td>Object-Code</td>
<td>Auto-generated based on Product Category. No action needed.</td>
</tr>
<tr>
<td>Sub Object Code</td>
<td>Auto-generated based on Product Category. No action needed.</td>
</tr>
<tr>
<td>Sub-Sub Object Code</td>
<td>Leave blank</td>
</tr>
<tr>
<td><strong>Budget / Distribution:</strong></td>
<td></td>
</tr>
<tr>
<td>If ONE budget:</td>
<td>Select appropriate budget from drop down menu.</td>
</tr>
</tbody>
</table>

- AP: Valle
  - 63-3233 (VALLE TRUST ADMIN)
  - 63-6230 (VALLE HENRIKKELLEN END)
  - 64-1112 (VALLE DISCRETIONARY FD)

- Area-Construction
  - 65-5550 (TRANSPO-CONST TRAVEL)

- Area-H&H
  - 65-4004 (Baker Hydraulics)

- Area-Structures
  - 06-8948 (CEE - PMP STRUCTURES)

- Area-Transportation
  - 06-8949 (CEE PMP TRANS)
  - 65-5550 (TRANSPO-CONST TRAVEL)

- Center-CT Scanner
  - 14-9426 (CT SCANNER)

- Center-RAPID
  - 61-1019 (NEHRI RAPID FACILITY; 2021-08-31)
  - 61-2488 (NEHR RAPID FACILITY; 2021-08-31)

- Center Structures Lab
  - 14-1027 (Structures Lab)

- **Dept**
  - 06-1026 (CEE)
  - 06-3363 (CEE SVC CONTRACTS)
  - 06-1026 (CEE)

**If MORE THAN ONE budget:**

- Click **Add (Split) Budget**
- Select if you want to distribute by **Percentage** or Distribute by **Dollar** amount.
12. Click **Save Line Item**. This adds the line item to your reimbursement.

13. Repeat steps 8-12 for **EACH LINE ITEM**.
14. Review all information and line items for accuracy, modify as needed.

**Attaching a file**

15. When all information is completed, upload supporting documents (e.g. receipts, emails, approvals, etc.) pertaining to each item listed on the order. Please reference [UW’s Receipt Policy Information](#) for required documentation.

   a. Click on **[Attach a file]**.
b. Click on Choose file. Find your file and upload.

c. Name your file with your order number (found on top left corner of page)

d. Click OK.

e. Click Submit Order for Purchase.

16. Click OK.
17. Your reimbursement request has been submitted to the CEE Fiscal Office. The Fiscal Office will then enter your request into ARIBA and update the status of your request in PurchasPATH. Please look for an email from ARIBA. You will need to approve your reimbursement request when all other approvals have been approved.

If you have any questions, please contact the CEE Fiscal Office at ceefisc@uw.edu, 54(3-2391) or 68(5-2312)