

# 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:

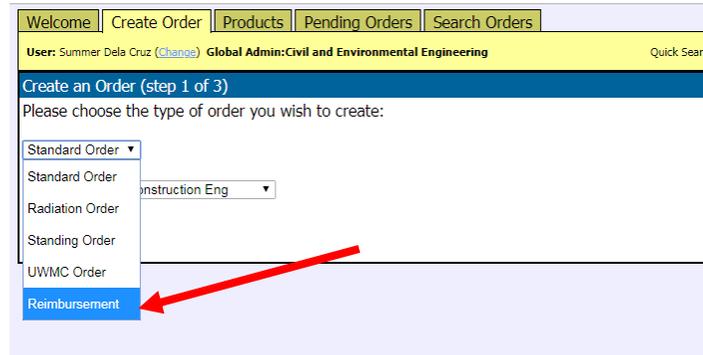
- I bought this for this grant.
- We decided to **celebrate** all the work we did and want to charge the grant.
- We bought a baby shower **gift** and want to charge my salary recapture
- This is alcohol to go to this **grant**.
- Various items
- Use **whichever** budget has money

### 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 O 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.

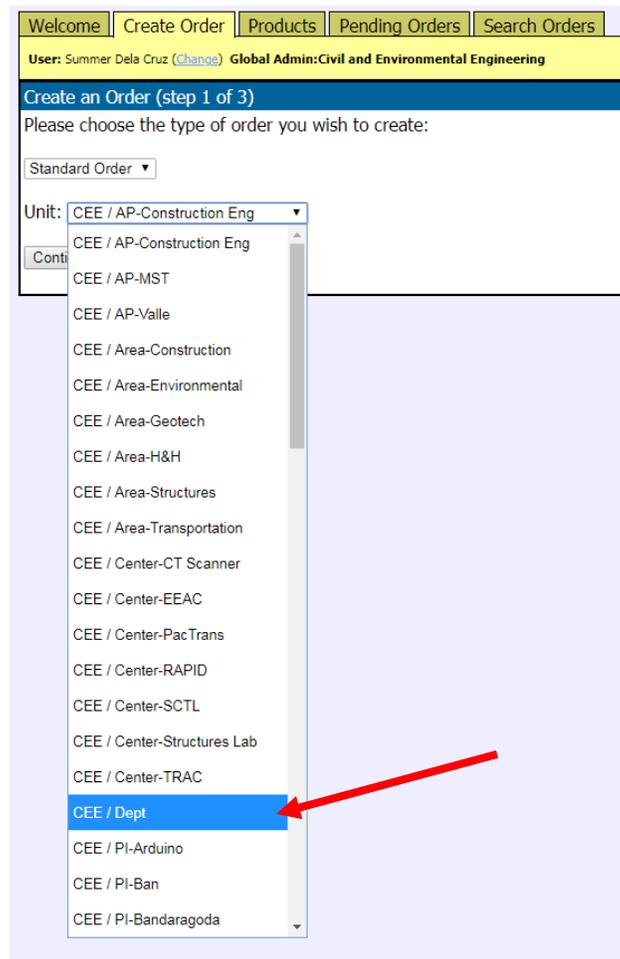
## General Reimbursement request steps:

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.



The screenshot shows the 'Create an Order' page. At the top, there are navigation tabs: 'Welcome', 'Create Order', 'Products', 'Pending Orders', and 'Search Orders'. Below the tabs, the user information is displayed: 'User: Summer Dela Cruz (Change) Global Admin:Civil and Environmental Engineering'. The main heading is 'Create an Order (step 1 of 3)'. Below this, the instruction reads 'Please choose the type of order you wish to create:'. A dropdown menu is open, showing the following options: 'Standard Order', 'Radiation Order', 'Standing Order', 'UWMC Order', and 'Reimbursement'. The 'Reimbursement' option is highlighted in blue, and a red arrow points to it.

3. Select appropriate “Unit”



The screenshot shows the 'Create an Order' page with the 'Unit' dropdown menu open. The 'Unit' field is currently set to 'CEE / AP-Construction Eng'. The dropdown menu lists the following units: 'CEE / AP-Construction Eng', 'CEE / AP-MST', 'CEE / AP-Valle', 'CEE / Area-Construction', 'CEE / Area-Environmental', 'CEE / Area-Geotech', 'CEE / Area-H&H', 'CEE / Area-Structures', 'CEE / Area-Transportation', 'CEE / Center-CT Scanner', 'CEE / Center-EEAC', 'CEE / Center-PacTrans', 'CEE / Center-RAPID', 'CEE / Center-SCTL', 'CEE / Center-Structures Lab', 'CEE / Center-TRAC', 'CEE / Dept', 'CEE / PI-Arduino', 'CEE / PI-Ban', and 'CEE / PI-Bandaragoda'. The 'CEE / Dept' option is highlighted in blue, and a red arrow points to it.

4. Click  .

5. Fill in the fields as directed:

<b>Person to be Reimbursed</b>	Name of person requesting reimbursement
<b>Phone Number</b>	Contact number for any questions
<b>Direct Deposit</b>	If you are a <b>UW employee</b> , check this box (non-UW employees see next field)
<b>Address to send Check</b>	For <b>non-UW employees</b> that do not have Direct Deposit set up, please fill in the mailing address you want to receive your check.
<b>Number of Attendees</b>	If requesting reimbursement for meal(s), enter the amount of attendees. Otherwise enter "N/A".
<b>Business Purpose (REQUIRED)</b>	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.

## SAMPLE

Welcome | Create Order | Products | Pending Orders | Search Orders

User: Summer Dela Cruz (Change) Global Admin: Civil and Environmental Engineering Quick Search for  in Order ID#  Search

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:

Phone Number:

Direct Deposit:

Address to send Check (if no direct deposit):

Number of attendees (if applicable):

Business Purpose (and list of attendees if not attached):

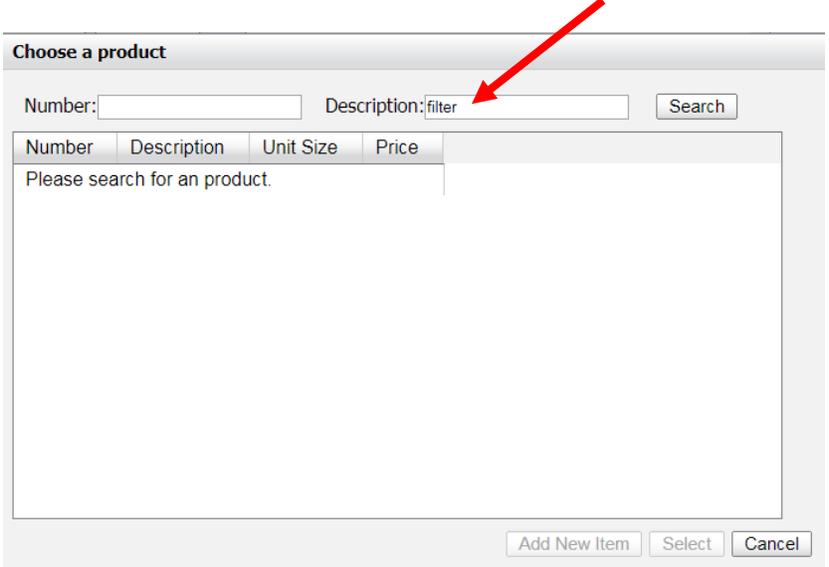
**Reminder: Please attach all receipts on the next page and retain all original receipts until reimbursement has been received!**

6. Click  .

7. Click [Add a Line Item](#) .

8. Enter in the item in the description field and click .

PurchasePath will require you to “search” for products even 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.

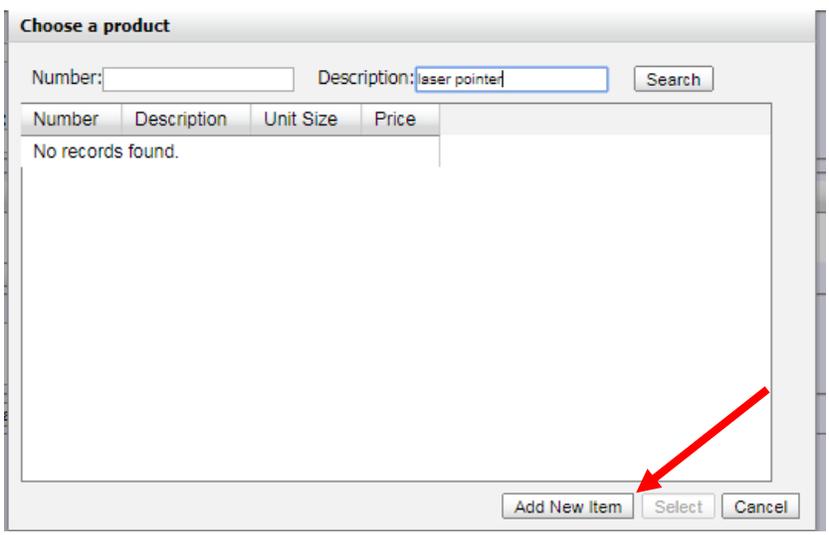


**Choose a product**

Number:  Description:

Number	Description	Unit Size	Price
Please search for an product.			

9. Click .

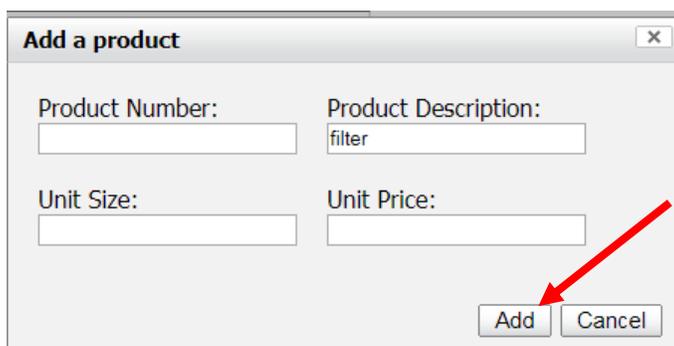


**Choose a product**

Number:  Description:

Number	Description	Unit Size	Price
No records found.			

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

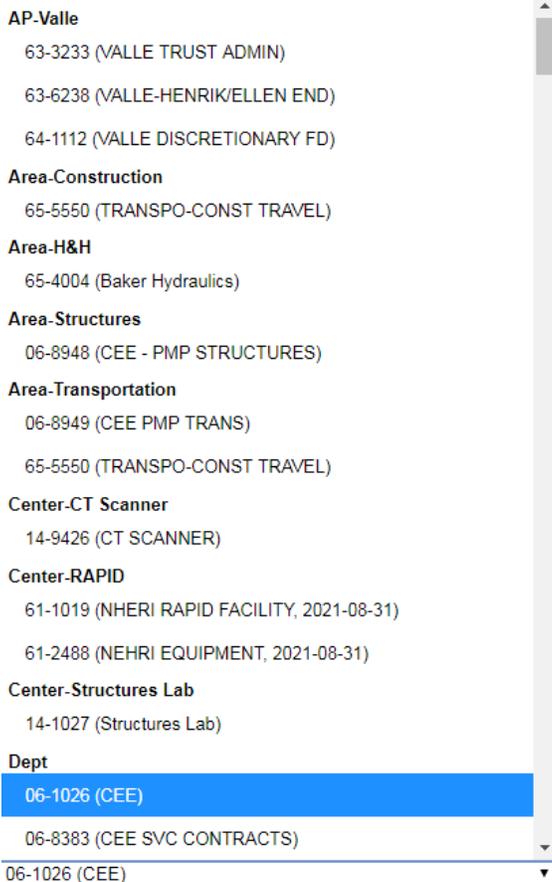


**Add a product**

Product Number:  Product Description:

Unit Size:  Unit Price:

11. Fill in fields as directed below:

<b>Quantity:</b>	Enter quantity purchased
<b>Unit Size:</b>	<i>Optional</i>
<b>Product Category:</b>	Scroll thru the list. If category is not listed, select "Unspecified".
<b>Unit Price:</b>	Enter cost (per item) before tax
<b>Total:</b>	<i>Automatically calculates tax</i>
<b>Object-Code:</b>	<i>Auto-generated based on Product Category. No action needed.</i>
<b>Sub Object Code:</b>	<i>Auto-generated based on Product Category. No action needed.</i>
<b>Sub-Sub Object Code:</b>	<i>Leave blank</i>
<b>Budget / Distribution:</b>	<p>If <b>ONE</b> budget:</p> <ul style="list-style-type: none"> <li>Select appropriate budget from drop down menu.</li> </ul>  <p>The screenshot shows a dropdown menu with the following items:</p> <ul style="list-style-type: none"> <li><b>AP-Valle</b> <ul style="list-style-type: none"> <li>63-3233 (VALLE TRUST ADMIN)</li> <li>63-6238 (VALLE-HENRIK/ELLEN END)</li> <li>64-1112 (VALLE DISCRETIONARY FD)</li> </ul> </li> <li><b>Area-Construction</b> <ul style="list-style-type: none"> <li>65-5550 (TRANSP0-CONST TRAVEL)</li> </ul> </li> <li><b>Area-H&amp;H</b> <ul style="list-style-type: none"> <li>65-4004 (Baker Hydraulics)</li> </ul> </li> <li><b>Area-Structures</b> <ul style="list-style-type: none"> <li>06-8948 (CEE - PMP STRUCTURES)</li> </ul> </li> <li><b>Area-Transportation</b> <ul style="list-style-type: none"> <li>06-8949 (CEE PMP TRANS)</li> <li>65-5550 (TRANSP0-CONST TRAVEL)</li> </ul> </li> <li><b>Center-CT Scanner</b> <ul style="list-style-type: none"> <li>14-9426 (CT SCANNER)</li> </ul> </li> <li><b>Center-RAPID</b> <ul style="list-style-type: none"> <li>61-1019 (NHERI RAPID FACILITY, 2021-08-31)</li> <li>61-2488 (NEHRI EQUIPMENT, 2021-08-31)</li> </ul> </li> <li><b>Center-Structures Lab</b> <ul style="list-style-type: none"> <li>14-1027 (Structures Lab)</li> </ul> </li> <li><b>Dept</b> <ul style="list-style-type: none"> <li><b>06-1026 (CEE)</b> (highlighted)</li> <li>06-8383 (CEE SVC CONTRACTS)</li> </ul> </li> </ul>
	<p>If <b>MORE THAN ONE</b> budget:</p> <ul style="list-style-type: none"> <li>Click <b>Add (Split) Budget</b>.</li> <li>Select if you want to distribute by <b>Percentage</b> or Distribute by <b>Dollar</b> amount.</li> </ul> <p><input checked="" type="radio"/> Distribute by Percentage <input type="radio"/> Distribute by Dollar</p>

- Select appropriate budgets.

06-1026 (CEE) ▼  
 Task:  Option:  Project:

75-1026 (CEE RCR) ▼  
 Task:  Option:  Project:

- Assign percentage or dollar amount (based on your selection in bullet 2)

Distribution

Distribution

**Notes:** Include any additional notes for the Fiscal Office such as link to line item, vendor,

12. Click  . This adds the line item to your reimbursement.

Product Number Requester	Description	Qty.	Unit Size	Unit Price	Budget(s)	Total Price									
1 Summer Dela Cruz ☒	filter <b>Office Supplies (05-64)</b> Object Code: 05-99	1.00		\$0.00	<b>06-1026</b> (CEE)	Sub-total: \$0.00	<input type="button" value="Edit"/> <input type="button" value="Del"/>								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><b>Budget Totals</b></td> <td style="width: 25%;"><b>Object Code Totals</b></td> <td style="width: 25%;"><b>Budget/Object Code Totals</b></td> <td style="width: 25%;"></td> </tr> <tr> <td>06-1026: \$0.00 (0%)</td> <td>05-99: \$0.00 (0%)</td> <td>06-1026/05-99: \$0.00 (0%)</td> <td></td> </tr> </table>							<b>Budget Totals</b>	<b>Object Code Totals</b>	<b>Budget/Object Code Totals</b>		06-1026: \$0.00 (0%)	05-99: \$0.00 (0%)	06-1026/05-99: \$0.00 (0%)		<b>Grand Total: \$0.00</b>
<b>Budget Totals</b>	<b>Object Code Totals</b>	<b>Budget/Object Code Totals</b>													
06-1026: \$0.00 (0%)	05-99: \$0.00 (0%)	06-1026/05-99: \$0.00 (0%)													

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]**.

<p><b>Delivery</b> 📄</p> <p><b>Summer Dela Cruz</b>                  Phone: 2066165338                  Direct Deposit: <input checked="" type="checkbox"/></p> <p>Number of Attendees: <b>N/A</b>                  Business Purpose: <b>REIMBURSEMENT FOR LASER POINTER NEEDED FOR CEE1234</b></p>	<p><b>General Info</b></p> <p>From: <b>Summer Dela Cruz</b> ✉️                  Admin of CEE                  (Change Unit)                  Date: Nov 08, 2018</p> <p><b>Purchasing Agent:</b>                  No Purchasing Agent (🗨️)</p> <p><b>Attachments:</b>  <a href="#">[Attach a file]</a> ←</p>	<p><b>Approvals &amp; Notes</b></p> <p>Approvals can be added after an order is submitted.</p> <p><b>Order Notes:</b>  <a href="#">[Add a Note]</a></p>
---	---	---

- b. Click on **Choose file**. Find your file and upload.

**Add a File to the Order**

Attach a document

1. Please choose your file:  
Choose File No file chosen

2. Give your file a title:  
  
(If you leave this blank, the filename will be used.)

OK Cancel

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

Welcome Create Order Products Pending Orders Search Orders Edit Order

User: Summer Dela Cruz (Change) Purchasing Agent: CEE Quick Search for  in

Pending Orders: Sort: Date

Order #1000362 - Edit Mode (View)

**Delivery**  
Summer Dela Cruz  
Phone: 2066165338  
Direct Deposit:   
Number of Attendees: N/A  
Business Purpose: REIMBURSEMENT FOR LASER POINTER NEEDED FOR CEE1234

**General Info**  
From: Summer Dela Cruz Admin of CEE (Change Unit)  
Date: Nov 08, 2018  
Purchasing Agent: No Purchasing Agent  
Attachments: [Attach a file]

- d. Click **OK**.  
e. Click **Submit Order for Purchase**.

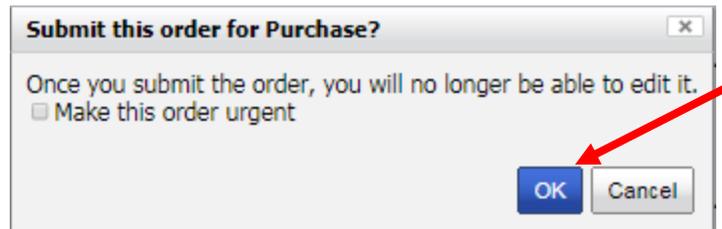
**Options**

Status: This order is currently not submitted to purchasing.

[Submit Order For Purchase](#) [Change Vendor](#)  
[Edit Delivery Information](#)  
[Edit Office Use Information](#)  
[Delete this order](#)

[Add a new line item](#)  
[Edit Additional Data](#)  
[Attach a File to this order](#)  
[Add a Note to this order](#)  
[Show Order History](#)  
[Print Order](#)  
[Print Receiving Report](#)  
[Return to Pending Orders](#)

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](mailto:ceefisc@uw.edu), 54(3-2391) or 68(5-2312)**