

Requesting a Travel 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. We recommend the 5 W's – who, what when, where and why. 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:

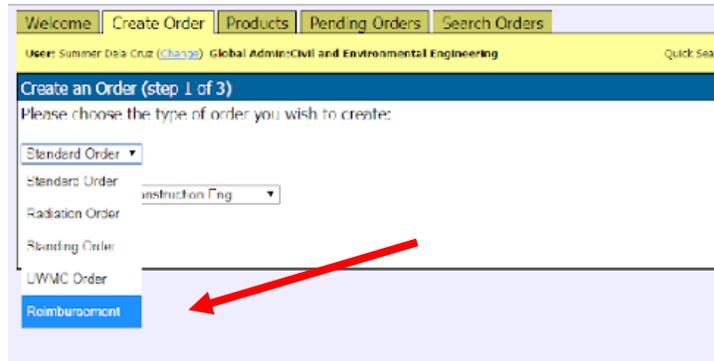
- I bought this for this grant.
- We decided to **celebrate** all the work we did and want to charge the grant.
- We bought a baby shower **gift** and want to charge my salary recapture
- This is alcohol to go to this **grant**.
- Various items
- Use **whichever** budget has money

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.

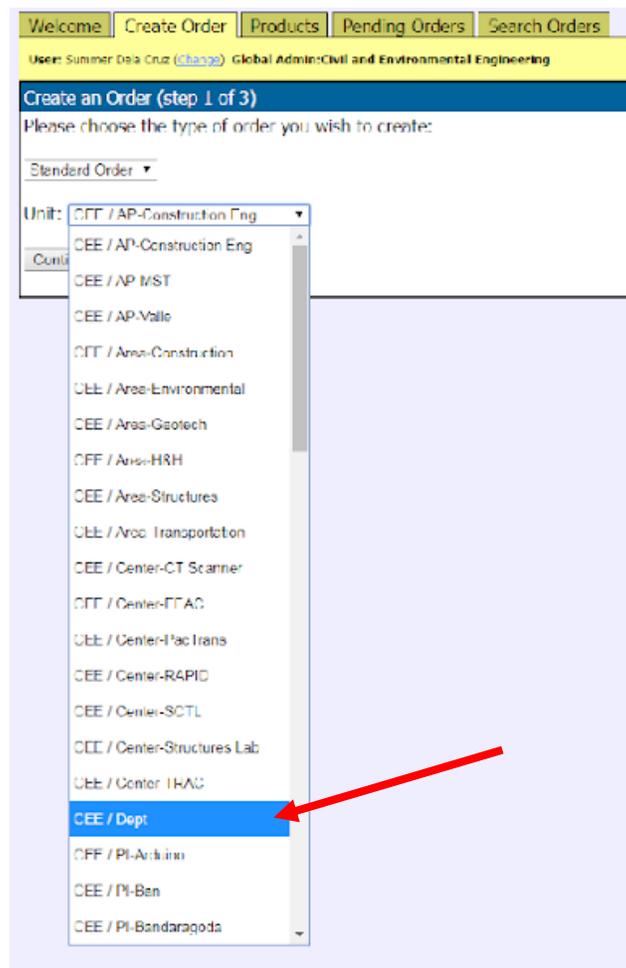
General Reimbursement request steps:

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 (step 1 of 3)' form. The user is logged in as 'Summer Dela Cruz' with the role 'Global Admin: Civil and Environmental Engineering'. The form prompts the user to 'Please choose the type of order you wish to create:'. A dropdown menu is open, showing the following options: 'Standard Order', 'Standard Order', 'Radiation Order', 'Reimbursement Order', 'LWMC 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 (step 1 of 3)' form. The user is logged in as 'Summer Dela Cruz' with the role 'Global Admin: Civil and Environmental Engineering'. The form prompts the user to 'Please choose the type of order you wish to create:'. The 'Standard Order' option is selected in the dropdown menu. Below this, the 'Unit' dropdown menu is open, showing a list of units. The 'CEE / Dept' unit is highlighted in blue, and a red arrow points to it.

4. Click .

5. Fill in the fields as directed:

Person to be Reimbursed	of person requesting reimbursement
Phone Number	t number for any questions
Direct Deposit	If you are a UW employee , check this box (non-UW employees see next field)
Address to send Check	For non-UW employees that do not have Direct Deposit set up, please fill in the mailing address you want to receive your check.
Number of Attendees	If requesting reimbursement for meal(s), enter the amount of attendees. Otherwise enter "N/A".
Business Purpose (REQUIRED)	Attend annual meeting of US-China Clean Energy Research Center in Beijing, China from 7/1-7/15/2019.

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 then go to Step 10. If the item is listed, highlight and click , skip to step 11.

Choose a product

Number: Description:

Number	Description	Unit Size	Price
No records found.			

Choose a product

Number: Description:

Number	Description	Unit Size	Price
	airfare		689.61

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

Add a product [X]

Product Number: Product Description:

Unit Size: Unit Price:

11. Fill in fields as directed below:

Quantity:	Enter quantity purchased
Unit Size:	<i>Optional</i>
Product Category:	Scroll thru the list. All travel categories are coded with a "04-".
Unit Price:	Enter total cost.
Total:	<i>Automatically calculates.</i>
Object-Code:	<i>Auto-generated based on Product Category. No action needed.</i>
Sub Object Code:	<i>Auto-generated based on Product Category. No action needed.</i>
Sub-Sub Object Code:	<i>Leave blank</i>
Budget / Distribution:	<p>If ONE budget:</p> <ul style="list-style-type: none"> Select appropriate budget from drop down menu. <p>Center RAPID</p> <p>61-1019 (NHERI RAPID FACILITY, 2021-08-31)</p> <p>61-2488 (NHERI EQUIPMENT, 2021-08-31)</p> <p>Center Structures Lab</p> <p>14-1027 (Structures Lab)</p> <p>Dept</p> <p>08-1026 (CEE)</p> <p>06-8383 (CEE SVC CONTRACTS)</p> <p>06-1026 (CEE)</p>
	<p>If MORE THAN ONE budget:</p> <ul style="list-style-type: none"> Click <input type="button" value="Add (Split) Budget"/> Select if you want to distribute by Percentage or Distribute by Dollar amount.

Distribute by Percentage Distribute by Dollar

- 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

50%

50%

Distribution

\$15.14

\$15.14

Notes: Include any additional notes for the Fiscal Office.

12. Click Save Line Item. This adds the line item to your reimbursement.

Product Number Requester	Description	Qty.	Unit Class	Unit Price	Budget(s)	Total Price	
1 Summer Dela Cruz	airfare Out of State Airfare (04-21) Object Code: 04-21	1.00		\$754.90	06-1026 (CEE)	Sub-total: \$754.90	<input type="button" value="Edit"/> <input type="button" value="Del"/>
Add a Line Item							
Budget Totals		Object Code Totals		Budget/Object Code Totals		Grand Total: \$754.90	
06-1026: \$754.90 (100%)		04-21: \$754.90 (100%)		06-1026/04-21: \$754.90 (100%)			

13. Repeat steps 8-12 **for EACH LINE ITEM.**

14. Review all information and line items for accuracy, modify as needed.

Attaching a file

- a. When all information is completed, upload supporting documents (e.g. receipts, emails, approvals, etc.) pertaining to each item listed on the order (NOTE: It is acceptable to have one file with all receipts). Please reference [UW's Receipt Policy Information](#) for required documentation.
- b. Click on **[Attach a file]**.

<p>Delivery </p> <p>Summer Dela Cruz Phone: 2066165338 Direct Deposit: <input checked="" type="checkbox"/></p> <p>Number of Attendees: N/A Business Purpose: REIMBURSEMENT FOR LASER POINTER NEEDED FOR CEE1234</p>	<p>General Info</p> <p>From: Summer Dela Cruz  Admin of CEE (Change Unit) Date: Nov 08, 2018</p> <p>Purchasing Agent: No Purchasing Agent </p> <p>Attachments: [Attach a file] </p>	<p>Approvals & Notes</p> <p>Approvals can be added after an order is submitted.</p> <p>Order Notes: [Add a Note]</p>
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- c. Click on **Choose file**. Find your file and upload.

Add a File to the Order ✕

Attach a document

1. Please choose your file:
 

2. Give your file a title:

(If you leave this blank, the filename will be used.)

- d. Click .

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

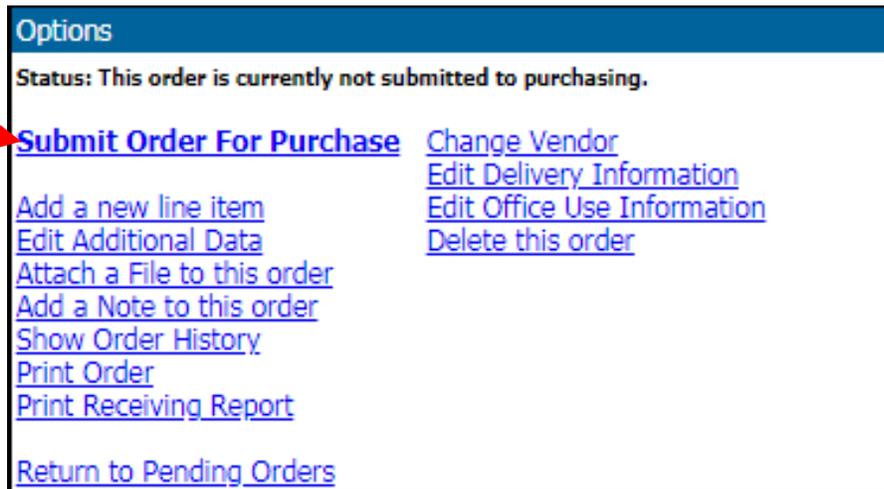
Options

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](#)



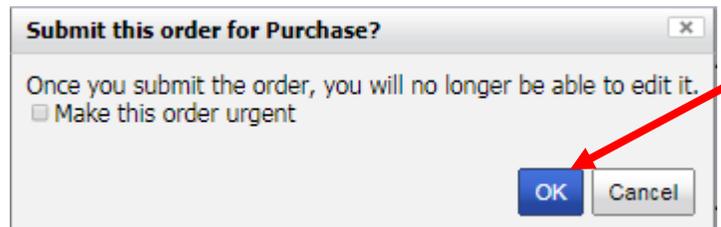
15. Click **OK**.

Submit this order for Purchase? [X]

Once you submit the order, you will no longer be able to edit it.

Make this order urgent

OK Cancel



16. Your travel 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)