

Submitting Procard Receipt(s) via PurchasePath

*This is a guide for all Cardholders to submit receipts via PurchasePath. **Each transaction/receipt is considered one Standard Order.** You will need to create a new order for each receipt.*

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.

Submitting ProCard Receipts

1. Log in to [PurchasePath](#)
2. Select **Standard Order** from down menu

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

User: Summer Dela Cruz ([Change](#)) Global Admin: Civil and Environmental Engineering

Create an Order (step 1 of 3)

Please choose the type of order you wish to create:

Standard Order ▼

Standard Order

Radiation Order

Standing Order

UWMC Order

Reimbursement

3. Select appropriate "Unit".

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

User: Summer Dela Cruz ([Change](#)) Global Admin: Civil and Environmental Engineering

Create an Order (step 1 of 3)

Please choose the type of order you wish to create:

Standard Order ▾

Unit: CEE / AP-Construction Eng ▾

Conti

- 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
- CEE / PI-Bandaragoda

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

Attention	Prefilled (If not prefilled, enter cardholder name)
Box Number	Prefilled or leave blank
Phone Number	Prefilled or leave blank
Delivery Address	Prefilled or leave blank
Date Desired	Optional
Ship Instructions	Optional

SAMPLE

Welcome	Create Order	Products	Pending Orders	Search Orders
---------	--------------	----------	----------------	---------------

User: Summer Dela Cruz ([Change](#)) Global Admin: Civil and Environmental Engineering

Create an Order (step 2 of 3)

Next we need some information about the order:

Attention:

Box Number:

Phone Number:

Delivery Address:

3760 E. Stevens Way NE
 Seattle, WA 98195

Date Desired:

Ship Instructions:

6. Click .

7. Type in the **Name of Vendor** and click **Go!**

Welcome	Create Order	Products	Pending Orders	Search Orders	Change Order
---------	--------------	----------	----------------	---------------	--------------

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

Find a Vendor

Please type in the name of the Vendor:

8. Select the appropriate vendor from the list by clicking on **USE** → Continue to Step 11.
If vendor is not on the list → Continue to next step (Step 9).

Search Results: Choose a Vendor		
Vendor ID	Name	Address
<input type="button" value="USE"/>	McMaster-Carr Supply Co (eP)	P.O. Box 54960 Los Angeles, CA 90054-0960
<input type="button" value="USE"/>	McmasterCarr	9630 Norwalk Blvd. Santa Fe Springs, CA 90670-2932

9. Click on **Add a new one**.

Search Results: Choose a Vendor

Vendor ID

Vendor not on this list?

10. Enter as much information as possible about the vendor and click on **Add Vendor**.

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

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

Add a new vendor

Vendor Name: **Phone:** **Fax:**

Address:

City: **State:** **Zip:**

Web Address:

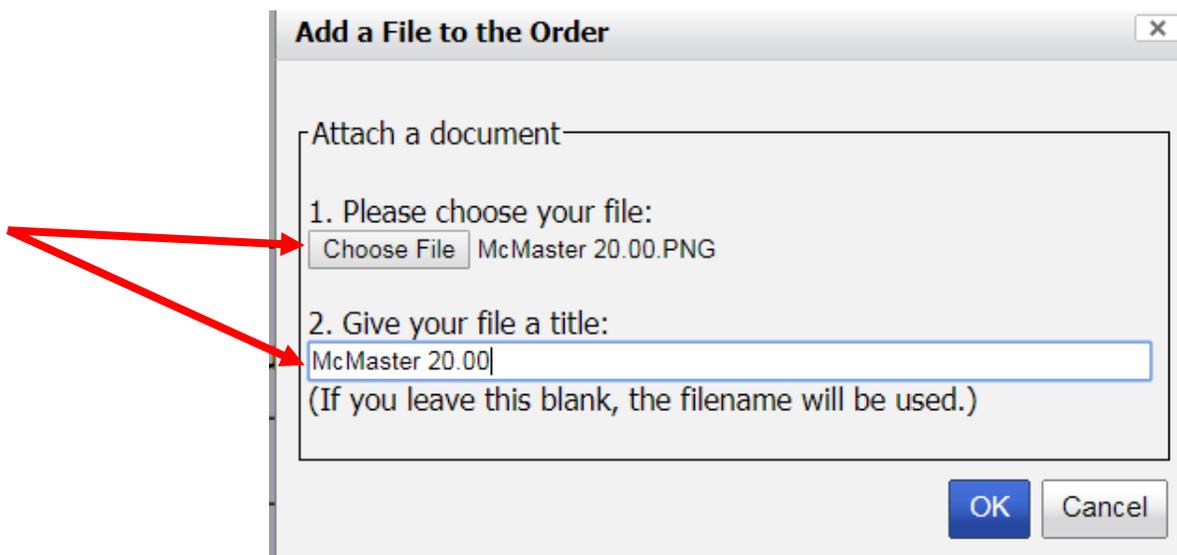
11. In the **General Info** section, attach scanned detailed/itemized receipt AND packing slip* by clicking on **[Attach a File]**.

**If you have not yet received the item, once received forward packing slip (email or mailbox is okay) to CEE Fiscal noting that it was a ProCard purchase.*

Please reference [UW's Receipt Policy Information](#) for required documentation.

Vendor  Vendor ID: McMaster-Carr Supply Co (eP) P.O. Box 54960 Los Angeles, CA 90054-0960 (562) 692-5911 (More...)	Delivery  Summer Dela Cruz More Hall 201F Phone: 206-616-5338 Box: 352700 Desired By: Shipping:	General Info From: Summer Dela Cruz  Admin of CEE (Change Unit) Date: Nov 29, 2018 Purchasing Agent: No Purchasing Agent  Attachments: [Attach a file]	Approvals & Notes Approvals can be added after an order is submitted. Order Notes: [Add a Note]
---	--	---	--

12. Click on **Choose file**. Find your file and upload.
 - a. Give your file a title: **Vendor + Total Dollar Amount**
 - b. Click **OK**.



13. In the **Approvals & Notes** section, click on **[Add a Note]**.
14. In the **Add Notes** box, please include:
 - a. **"PROCARD RECEIPT"**
 - b. **Business purpose**

IMPORTANT NOTE:

This action notifies the Fiscal Office that this is NOT A PURCHASE OR REIMBURSEMENT.

Add Notes [X]

Please enter notes about the order. Your name and date/time will be logged with the note.

PROCARD RECEIPT
Grinding wheels and spring for limit sensor.

OK Cancel

15. Click .

16. Click **Add a Line Item**.

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

User: Summer Dela Cruz (1004358) Purchasing Agent: CEE Quick Search for: in Order ID: Search

Pending Orders: Sort: Date

Order #1004358 - Edit Mode (View)

Vendor Vendor ID: (More...)	Delivery Phone: Box: Desired By: Shipping:	General Info From: Summer Dela Cruz Admins of CEE (Change Unit) Date: Nov 30, 2018 Purchasing Agent: No Purchasing Agent (N/A) Attachments: (Attach a file)	Approvals & Notes Approvals can be added after an order is submitted. Order Notes: Summer Dela Cruz, 11/30/2018 (Add a Note)
--	---	--	--

WARNING: The lab is not finished with this request.

Product Number Requester	Description	Qty.	Unit Size	Unit Price	Budget(s)	Total Price
Add a Line Item						

Budget Totals Object Code Totals Budget/Object Code Totals

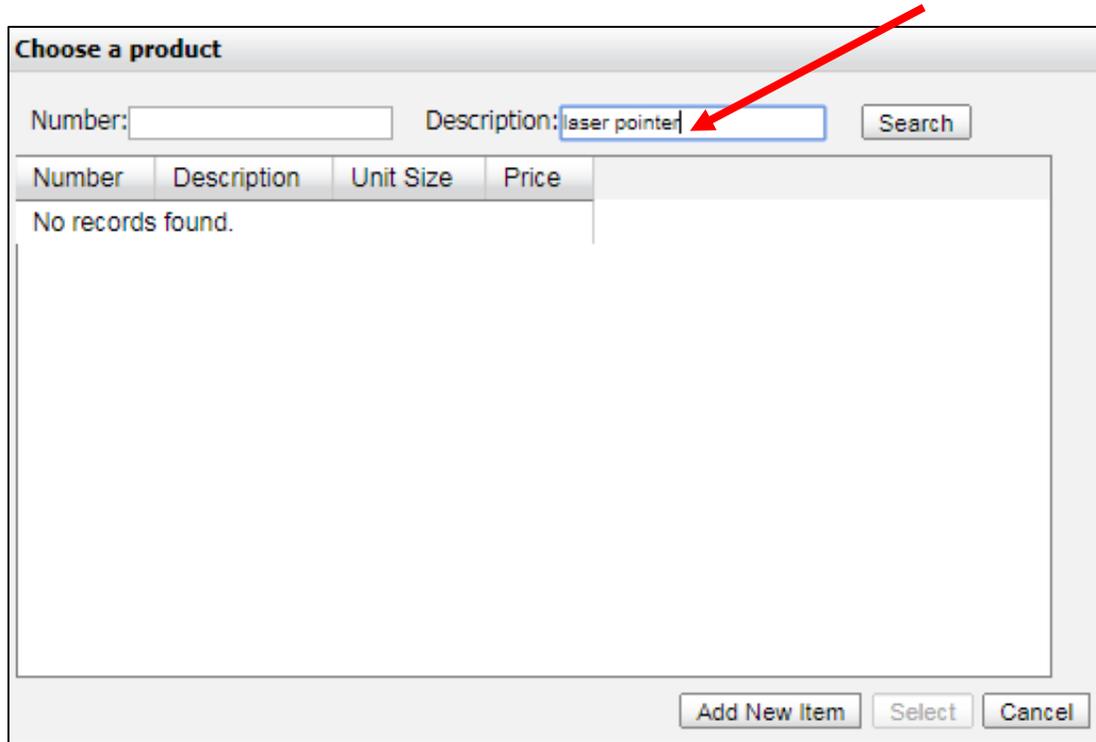
Sub-Total: \$0.00
Tax: (10.1%) \$0.00
Shipping: \$0.00 (w/tax: 0.00)
Grand Total: \$0.00

Office Use

PO Number	Shipping Charges	Expected Delivery Date	Vendor Contact	Vendor Reference No.
-----------	------------------	------------------------	----------------	----------------------

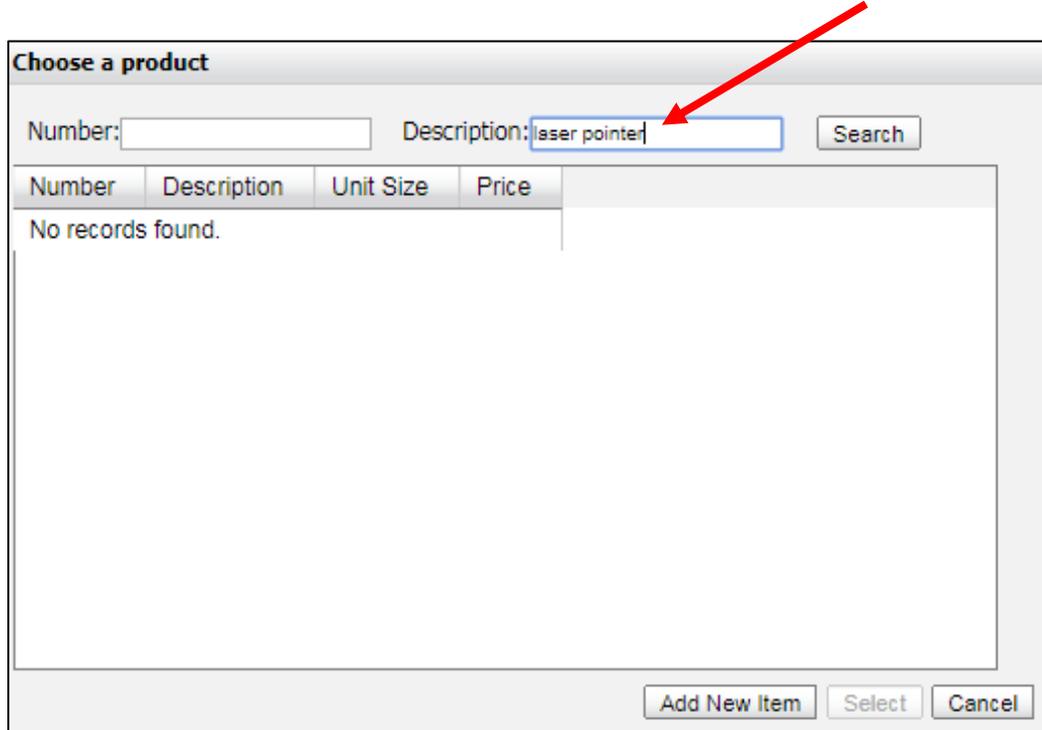
Options
Status: This order is currently not submitted to purchasing.
[Add a new line item](#) [Change Vendor](#)
[Edit Additional Data](#) [Edit Delivery Information](#)
[Edit Office Use Information](#) [Delete this order](#)
[Attach a file to this order](#)
[Add a Note to this order](#)
[Show Order History](#)
[Print Order](#)
[Print Receiving Report](#)
[Return to Pending Orders](#)

17. Enter in the item in the description field and click **Search**.



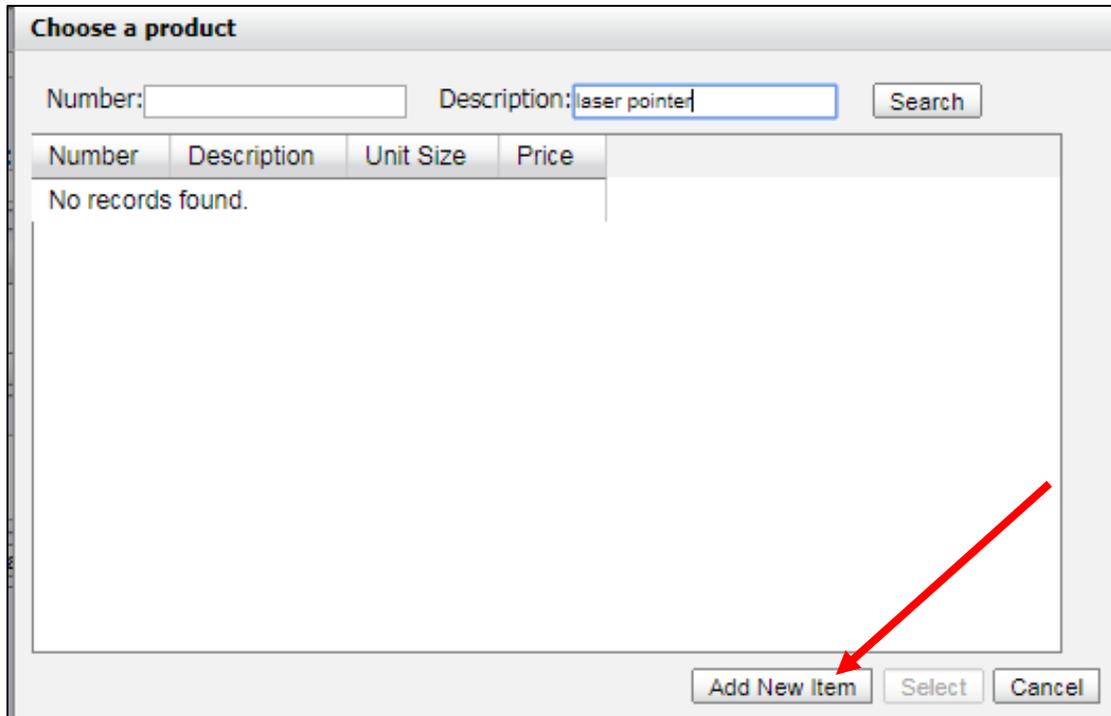
The screenshot shows a dialog box titled "Choose a product". At the top, there are two input fields: "Number:" and "Description:". The "Description:" field contains the text "laser pointer". A red arrow points from the top right towards the "Description:" field. To the right of the "Description:" field is a "Search" button. Below the input fields is a table with the following headers: "Number", "Description", "Unit Size", and "Price". The table body contains the text "No records found." At the bottom of the dialog box are three buttons: "Add New Item", "Select", and "Cancel".

18. Enter in the item in the description field and click **Search**.



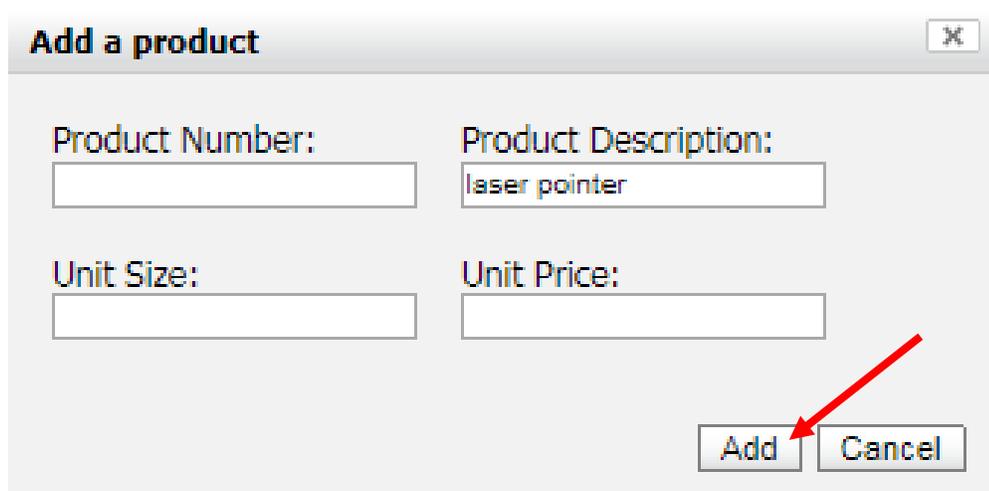
This screenshot is identical to the one above, showing the "Choose a product" dialog box. The "Description:" field contains "laser pointer", and a red arrow points to it. The "Search" button is visible, and the table below it shows "No records found." The "Add New Item", "Select", and "Cancel" buttons are at the bottom.

19. Click **Add New Item**



The screenshot shows a dialog box titled "Choose a product". At the top, there are two input fields: "Number:" (empty) and "Description:" (containing "laser pointer"). To the right of the description field is a "Search" button. Below these fields is a table with the following headers: "Number", "Description", "Unit Size", and "Price". The table content is empty, with the text "No records found." displayed below the headers. At the bottom of the dialog box, there are three buttons: "Add New Item", "Select", and "Cancel". A red arrow points to the "Add New Item" button.

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



The screenshot shows a dialog box titled "Add a product" with a close button (X) in the top right corner. It contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Product Number:" and is empty. The top-right field is labeled "Product Description:" and contains "laser pointer". The bottom-left field is labeled "Unit Size:" and is empty. The bottom-right field is labeled "Unit Price:" and is empty. At the bottom right of the dialog box, there are two buttons: "Add" and "Cancel". A red arrow points to the "Add" button.

21. Fill in fields as directed below:

Quantity:	Enter quantity
Unit Size:	<i>Optional</i>
Product Category:	Scroll thru the list. If category is not listed, select "Unspecified."
Unit Price:	Enter cost (per item) before tax
Total:	<i>Automatically calculates tax</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 budget is not listed in drop-down menu, email tjhanson@uw.edu requesting to add the budget to PurchasePath.</p> <p>If ONE budget:</p> <ul style="list-style-type: none">• Select appropriate budget from drop down menu.

AP-Valle

63-3233 (VALLE TRUST ADMIN)

63-6238 (VALLE-HENRIK/ELLEN 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 (NHRI RAPID FACILITY, 2021-08-31)

61-2488 (NHRI EQUIPMENT, 2021-08-31)

Center-Structures Lab

14-1027 (Structures Lab)

Dept

06-1026 (CEE)

06-8383 (CEE SVC CONTRACTS)

06-1026 (CEE)

If **MORE THAN ONE** budget:

Add (Split) Budget

- Click **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)

	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 150px;"> <p style="text-align: center; background-color: #f0f0f0; margin: 0;">Distribution</p> <p style="background-color: #0056b3; color: white; padding: 2px; text-align: center;">50%</p> <p style="background-color: #e1eef6; padding: 2px; text-align: center;">50%</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 150px;"> <p style="text-align: center; background-color: #f0f0f0; margin: 0;">Distribution</p> <p style="background-color: #0056b3; color: white; padding: 2px; text-align: center;">\$15.14</p> <p style="background-color: #e1eef6; padding: 2px; text-align: center;">\$15.14</p> </div> </div>
Notes:	<i>Include any additional notes for the Fiscal Office.</i>

22. Click Save Line Item .

Product Number Requester	Description	Qty.	Unit Size	Unit Price	Budget(s)	Total Price
1 Summer Dela Cruz	laser pointer Miscellaneous Service (03-99) Object Code: 03-99	1.00		\$0.00	06-1026 (CEE)	Sub-total: \$0.00 With Tax: \$0.00
Add a Line Item						
Budget Totals	Object Code Totals	Budget/Object Code Totals		Sub-Total: \$0.00 Tax: (10.1%) \$0.00 Shipping: \$0.00 (w/tax: 0.00) Grand Total: \$0.00		
06-1026: \$0.00 (0%)	03-99: \$0.00 (0%)	06-1026/03-99: \$0.00 (0%)				

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

24. Click **Submit Order for Purchase**.

Options

Status: This order is currently not submitted to purchasing.

[Submit Order For Purchase](#) [Change Vendor](#)

[Add a new line item](#) [Edit Delivery Information](#)

[Edit Additional Data](#) [Edit Office Use Information](#)

[Attach a File to this order](#) [Delete this order](#)

[Add a Note to this order](#)

[Show Order History](#)

[Print Order](#)

[Print Receiving Report](#)

[Return to Pending Orders](#)

25. Click OK .

26. Your Procard receipt has been submitted to the CEE Fiscal Office. The Fiscal Office will review this information against PaymentNet and will update your request in PurchasPATH. Once all receipts are received, the CEE Fiscal Office will email you a Detailed Transaction Report for your review and signature.

Questions:
Contact the CEE Fiscal Office by:
Email: ceefisc@uw.edu
Phone: 206-616-5338 or 206-543-2391