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 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.
Submitting ProCard Receipts

1. Log in to PurchasePath
2. Select **Standard Order** from down menu

![Screenshot of PurchasePath](image)

3. Select appropriate “Unit”. 
4. Click **Continue**.
5. Fill in the fields as directed:

<table>
<thead>
<tr>
<th><strong>Attention</strong></th>
<th>Prefilled (If not prefilled, enter cardholder name)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Box Number</strong></td>
<td>Prefilled or leave blank</td>
</tr>
<tr>
<td><strong>Phone Number</strong></td>
<td>Prefilled or leave blank</td>
</tr>
<tr>
<td><strong>Delivery Address</strong></td>
<td>Prefilled or leave blank</td>
</tr>
<tr>
<td><strong>Date Desired</strong></td>
<td>Optional</td>
</tr>
<tr>
<td><strong>Ship Instructions</strong></td>
<td>Optional</td>
</tr>
</tbody>
</table>

**SAMPLE**

*Updated 8/1/2019, by SLDC*
Create an Order (step 2 of 3)

Next we need some information about the order:

Attention: John Smith
Box Number: 352700
Phone Number: 206-123-4567
Delivery Address:
3760 E. Stevens Way NE
Seattle, WA 98195

Date Desired: 
Ship Instructions: Standard

Continue

6. Click Continue.

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

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

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

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.
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.

15. Click **OK**.

16. Click **Add a Line Item**.
17. Enter in the item in the description field and click **Search**.

18. Enter in the item in the description field and click **Search**.
19. Click **Add New Item**

![Add New Item](image1.png)

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

![Add a product](image2.png)
21. Fill in fields as directed below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantity:</strong></td>
<td>Enter quantity</td>
</tr>
<tr>
<td><strong>Unit Size:</strong></td>
<td>Optional</td>
</tr>
<tr>
<td><strong>Product Category:</strong></td>
<td>Scroll thru the list. If category is not listed, select “Unspecified.”</td>
</tr>
<tr>
<td><strong>Unit Price:</strong></td>
<td>Enter cost (per item) before tax</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>Automatically calculates tax</td>
</tr>
<tr>
<td><strong>Object-Code:</strong></td>
<td>Auto-generated based on Product Category. No action needed.</td>
</tr>
<tr>
<td><strong>Sub Object Code:</strong></td>
<td>Auto-generated based on Product Category. No action needed.</td>
</tr>
<tr>
<td><strong>Sub-Sub Object Code:</strong></td>
<td>Leave blank</td>
</tr>
<tr>
<td><strong>Budget / Distribution:</strong></td>
<td>If budget is not listed in drop-down menu, email <a href="mailto:tjhanson@uw.edu">tjhanson@uw.edu</a> requesting to add the budget to PurchasePath.</td>
</tr>
<tr>
<td></td>
<td>If <strong>ONE</strong> budget:</td>
</tr>
<tr>
<td></td>
<td>• Select appropriate budget from drop down menu.</td>
</tr>
</tbody>
</table>
If **MORE THAN ONE** budget:

- Click **Add (Split) Budget**.

- Select if you want to distribute by **Percentage** or Distribute by **Dollar** amount.

- Select appropriate budgets.

- Assign percentage or dollar amount (based on your selection in bullet 2)
22. Click **Save Line Item**.

![Table with product number, description, quantity, unit price, etc.]

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

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

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

*Updated 8/1/2019, by SLDC*