All purchases are subject to UW policy (see [http://finance.uw.edu/ps/resources/policies-and-procedures](http://finance.uw.edu/ps/resources/policies-and-procedures)).

Authorized purchasers should follow the below guidelines. Students purchasing supplies for courses or curriculum-related projects (e.g., Launch) will have specific instructions on how to place orders.

**FOOD & ALCOHOL**

Please note the following special considerations for purchasing food, meals, and alcohol:

- **Meals**: The allowed costs (based on the local per Diem rates) are calculated off the number of actual attendees. Based on the number of attendees, we will need to verify we are within the per diem limits and any overage for pre-approved food/meals will have to go on a discretionary budget. This means we must take attendance for all events where per diem limits are in question.
- **If light refreshments are served** (like those provided at some student speaker events) per diem limits and taking attendance are optional, though costs must be reasonable.
- **Alcohol**: Use of discretionary funds (to pay for alcohol, per diem overages, etc.) must be approved before the costs are incurred.

Per diem rates are set by county; links to domestic and international per diem rates can be found here: [https://finance.uw.edu/travel/meals](https://finance.uw.edu/travel/meals) (Seattle/King County rates are $19 or breakfast, $22 for lunch, and $33 for dinner).

**AMAZON BUSINESS**

Authorized purchasers can place orders anytime using the Amazon Business account.

- GIX can review, approve, and/or cancel orders directly from Amazon.
- **Purchasing leads will usually be designated for each course and/or project** and given access to the GIX Amazon account.
- If a student/team purchase is questioned or rejected, the purchaser will be contacted.
- Purchase requests may be made at any time.

To help ensure we use the correct budget and to facilitate delivery, please follow the following process:

- **Log into Amazon** with your UW email account and place order, with your team’s name and/or code in the reference line. (Staff: PCA codes can be added on Business Order Information page in the Purchase Order Number field.)
- **Add recipient** to the Shipping Address page in the Deliver To field.
- **Remove the tax exemption** before completing your purchase, at the very last stage of the checkout process. (Amazon applies a tax exemption to all the orders we place, but this exemption is not permitted for the vast majority of our purchases.)
REIMBURSEMENTS

All reimbursements must be pre-approved (i.e., before you buy anything yourself, get approval).

When making purchases on a personal card to be reimbursed later, be sure to keep a copy of the itemized receipt (which means it shows a list of every item purchased). If an itemized version isn’t available, be sure to make a full list of the items purchased that you include when you turn in your receipt(s).

Unfortunately, receipts are required regardless of cost and we are not allowed to reimburse with a perjury statement alone (travel reimbursements have a different set of rules). When in doubt, keep any materials that accompany your order, we’ll sort through them when we receive them.

Summary of necessary information for reimbursement requests:

- Itemized receipt (If lost or not available, we will need a list of everything purchased, plus a perjury statement) and proof of payment (may be on a different receipt)
- If asking for reimbursement for food purchases
  - Need pre-authorization in writing (that takes per diem limits into account)
  - Need number and names of people who attended
- If something was shipped directly to you, sign and date the packing slip and give to Gail (see correct way to scan below). If no packing slip, get copy of shipping label, sign and date it, write “No Packing Slip”, and write out what was in the box and send to gixpay@uw.edu.

ARIBA

Staff or others who have been trained to use UW’s purchasing system Ariba, may place orders directly. When you are naming your requests in Ariba (eProcurement orders, Non-Catalog orders, etc.), please be sure to include the following:

- Budget number for the purchase (using “Split” for multiple budgets is fine).
- Name of the person making the request or the person to go to with questions about the order (first initial and last name is fine).
- Vendor being ordered from (please use one request/submission per vendor).
- Short description of the order (something like the name of the primary item(s) being ordered or the purpose of the order).
- Date you are submitting the order.

Example: 12-3456_G Greenwood_Office Depot_Tape & Paper_05/24/2018
DOCUMENTATION

For ALL purchases, be sure to sign and date the packing slips when you receive your order. This is one of the first things checked in an audit and is essential if we ever need to show when an item arrived and who to see if it can’t be found.

- If no packing slip is included (Amazon is notorious for this), please try to get a copy of the shipping label. A flatbed scan/copy is preferred, but if the box is too big, photos are OK (make sure the label is square and not taken at an angle).
- If you make a paper copy, be sure to sign and date it, write “No Packing Slip”, and include what was in the box. If you make a digital copy, be sure to include that info in your email when you forward the label(s).
- NEVER THROW AWAY A PACKING SLIP/RECEIPT.

SCANNING

Please note the correct way to scan receipts and/or packing slips:

- Save as PDF files.
- Flat receipts should be taped to letter-sized sheets, taking care to tape down all sides of the receipt(s) securely, and making sure that the entire document is visible.
- After scanning is complete, verify the final document meets protocol, including adding the words “Best Scan Possible” at the end of the naming protocol if a document image is not clear, and to avoid future confusion.

Scanning issues that should be corrected:

- **Specckles or spots on the scanned image**: Clean the glass on the scanner and rescan the paper.
- **Skewed images that are not properly aligned**: Rescan the paper so that the image appears straight. All portrait orientation pages should be rotated to read from left to right. All landscape orientation pages should be rotated with the top of the page facing the left.
- **Sometimes only part of the document is captured by the scanner**: Rescan the paper so that it is properly aligned and the entire page is included in the scanned image.
- **If the scanned record is of poor quality and is not clearly readable**: Reset the dpi (dots per inch) setting on the scanner to a setting higher than 300 dpi and scan again. Keep increasing the dpi until the record is as readable as possible.