Purchasing

Once your team has completed all steps necessary to gain authority to purchase and you are ready to initiate purchases, please follow the instructions below:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Preapproval</th>
<th>Order/Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon</td>
<td>Designated purchasing lead will receive access to the GIX Amazon account and may purchase at any time. Purchases will be ordered upon approval of your instructor or delegate. Purchases without a project code will not be approved.</td>
<td>Not required</td>
<td>Log into Amazon with your UW email account and place order, including your team's name and/or code in the reference line. Order form: <a href="mailto:gixpay@uw.edu">gixpay@uw.edu</a></td>
</tr>
<tr>
<td>Non-Amazon Purchases</td>
<td>You must request approval for any other purchase ahead of time. Purchases from online vendors will be ordered by the GIX fiscal team upon approval of your instructor or delegate. Purchases without a project code will not be approved.</td>
<td>Designated purchasing lead should complete the online ordering form.</td>
<td>GIX will purchase on your behalf.</td>
</tr>
<tr>
<td>Mechanical Turk</td>
<td>You must request approval for your MTurk project ahead of time. To ensure fiscal accountability and prevent conflict of interest, we must ensure funds are not distributed to UW employees, immediate relatives, or students involved in the actual research. Failure to disqualify participants based on these criteria, use MTurk for a project beyond scope of proposed work, or for non-GIX purposes will result in your team's immediate loss of ability to use MTurk.</td>
<td>Designated purchasing lead will receive a request to join AWS, and then must link account to the GIX Fiscal account for direct billing. Link account (once): <a href="https://gix.aws.amazon.com/developer">https://gix.aws.amazon.com/developer</a></td>
<td>All services done through MTurk must have a qualifying question asked on every survey/service request that asks the participant, &quot;Are you an employee of the University of Washington, family member of a UW employee, or UW student involved in this particular research?&quot; If the participant answers &quot;yes&quot; to any question, they must be disqualified from participating in the task. GIX will pay directly for charges via AWS.</td>
</tr>
<tr>
<td>Research Incentives</td>
<td>You must request approval to offer research incentives ahead of time. To ensure fiscal accountability and prevent conflict of interest, we must ensure funds are not distributed to UW employees, immediate relatives, or students involved in the actual research. Failure to disqualify based on these criteria will result in your team's immediate loss of ability to issue incentives.</td>
<td>Designated purchasing lead should complete the online ordering form. Request for Approval: <a href="https://gix.uaex.edu/purchasing/incentive-request/">https://gix.uaex.edu/purchasing/incentive-request/</a></td>
<td>All participants must complete the form that includes the question &quot;Are you an employee of the University of Washington, family member of a UW employee, or UW student involved in this particular research?&quot; If the participant answers &quot;yes&quot; to any question, they must be disqualified from participating in the task. Participant form: <a href="https://gix.uaex.edu/purchasing/incentive-request/">https://gix.uaex.edu/purchasing/incentive-request/</a></td>
</tr>
<tr>
<td>Travel</td>
<td>All travel must be pre-approved. Travel arrangements should be coordinated with GIX staff and made using a GIX-approved travel agent. Purchases made prior to receiving written approval may not be reimbursable. Flights may be booked directly through GIX's travel agent.</td>
<td>Designated purchasing lead or traveler should complete a travel request prior to travel. GIX fiscal staff will follow up to provide approval and guidelines for arranging travel. Request for Travel Approval: <a href="https://gix.uaex.edu/purchasing/travel-request/">https://gix.uaex.edu/purchasing/travel-request/</a></td>
<td>To receive reimbursement after your trip, complete the GIX Travel Reimbursement form. Travel reimbursement request form: <a href="https://gix.uaex.edu/content/dam/mturk/2018/Travel_Reimbursement.pdf">https://gix.uaex.edu/content/dam/mturk/2018/Travel_Reimbursement.pdf</a> Return form with your receipts to <a href="mailto:gixpay@uw.edu">gixpay@uw.edu</a> or in person to Gail Greenwood.</td>
</tr>
<tr>
<td>Personal Purchases</td>
<td>You may need to make certain purchases yourself through certain services, local transportation within Seattle (Uber), or in person at the store (e.g., Home Depot). Please note: all reimbursements must be pre-approved. If you are traveling more than 50 miles from GIX, your trip is considered travel (see above). This option is not available for items that can be ordered through Amazon or other vendors by GIX.</td>
<td>Designated purchasing lead should complete the online ordering form</td>
<td>Request reimbursement using the online form. Be sure to save your original receipt and signed and dated packing slip. Submit online if you are able to scan a FLAT and STRAIGHT scan of the receipt, or submit the original to Gail. Reimbursement request form: <a href="https://gix.uaex.edu/purchasing/incentive-request/">https://gix.uaex.edu/purchasing/incentive-request/</a></td>
</tr>
</tbody>
</table>

Receiving

Makerspace staff receive all packages and will bring the hard copy of the receipt or packing slip to the GIX Fiscal Team with the annotation "received on XXXXX/XXX" or email to gixpay@uw.edu. They will notify your team that your supplies have arrived via the purchase spreadsheet and place them in a locker.

Tracking

Your launch project team is responsible for tracking your team's budget and receipt of items in your purchase. You can copy order information from your purchase/travel confirmation emails into your budget spreadsheet from the purchase summary spreadsheet: [https://uwmetid.sharepoint.com/f1/sites/gix/Shared%20Documents/Shared%20with%20Students?csf=1&rs=16&wf=0&fr=0&date=05/07/18](https://uwmetid.sharepoint.com/f1/sites/gix/Shared%20Documents/Shared%20with%20Students?csf=1&rs=16&wf=0&fr=0&date=05/07/18)
**Guide to Purchasing Launch Project Supplies - Students**
**Summer 2019**

- **Ensure purchase is allowable**: i.e., has a clear business purpose, fits in your budget, does NOT include alcohol, entertaining, meals paid for others, or gifts.

- **Determine type of purchase:**
  - Travel
    - **Pre-Travel:** Read Travel Guide
    - **Post-Travel:** Get Reimbursed
    - **Order using GIX Amazon account**
    - **GIX review, approval by email**
    - **Add costs to budget spreadsheet**
  - **Post-Travel:** Get Reimbursed
    - **Complete Travel Reimbursement Form**
    - **GIX processes reimbursement in Ariba**
    - **Approve and receive payment by check or, if UW employed, by direct deposit**
  - **Purchase On Own & Get Reimbursed**
    - **Complete Purchase Request Form**
    - **Purchase item and receive order confirmation. Save pack slip/receipt.**
    - **GIX processes reimbursement in Ariba**
    - **Approve and receive payment by check or, if UW employed, by direct deposit**
  - **Purchase Through GIX/Amazon**
    - **Complete Purchase Request Form**
    - **GIX review, approval by email, and order**
    - **Add costs to budget spreadsheet**
    - **Delivery via MKR CRW**
  - **Purchase Through GIX/Other Vendors**
    - **Complete Purchase Request Form**
    - **GIX review, approval by email, and order**
    - **Add costs to budget spreadsheet**
    - **Delivery via MKR CRW**
  - **Purchase Through GIX/Research Incentive**
    - **Complete Purchase Request Form**
    - **GIX review, approval by email**
    - **Participate to complete Incentive Payment Request**
    - **GIX to issue payment**
    - **Add costs to budget spreadsheet**
  - **Purchase though Mechanical Turk**
    - **Complete Purchase Request Form**
    - **GIX review, approval by email**
    - **Link AWS account to GIX Fiscal account (one time)**
    - **Create project in Mechanical Turk**
    - **GIX pays AWS invoice directly**

- **Add costs to budget spreadsheet**
- **Arrange through GIX travel agent**
- **Update costs in budget spreadsheet if needed**