

How to Process After-the-Fact Payments (More than \$200)

Effective Feb. 22, 2016

University policy requires a purchase order to be created prior to placing orders for goods and services with vendors. Orders that are placed by individuals prior to the creation of a purchase order require VP approval. As a result, this form must be submitted and approved to avoid duplication of the order and to facilitate payment. Please note, in accordance with University policy, the submission of this form does not guarantee the University will assume responsibility for the payment of this invoice or relieve the individual that placed this order from personal liability for the purchase.

Log-in to PAW Place and go to the "Shopping" area.

- From the **After the Fact Purchase** section
 - select the **After the Fact Purchase**

Enter the required information on the form:

- **Supplier Info**—Enter the name or "W" number of the individual that is requesting the reimbursement. This cannot be the requestor. Your cart will be automatically reject if you try to request a refund for yourself.
 - **Unknown Supplier**—If the individual is not set-up in PAW Place, use Unknown as the supplier name and complete the name/address/other information. Do not include a social security number. You can fax or send via campus email a vendor registration form if the individual needs to be set-up in the system. In the notes section you can include the "W" number of the individual if you know it and Purchasing will update the supplier in PAW Place.
- **General Info**
 - Product Description--Describe service or product
 - Quantity--How many items were purchased?
 - UOM--Unit of Measure--EA for each or select appropriate UOM
 - Unit Price—How much was paid for each unit?
 - Was Alcohol Purchased? (select Yes or No)
 - Check here if this a Group Travel Reimbursement—Use for reimbursements where you were unable to use the Travel application because there was more than one individual traveling. (No VP approval)
 - Additional Product Information—Check all that apply.
- **Justification & Invoice**
 - **Justification for After the Fact Purchase**-- State why this transaction needed to be an After the Fact purchase.
 - **Internal Attachments**—Attach copy of the receipt, invoice, email, or other documentation.
- **Select "Add and go to Cart" then select GO.** Your request will be sent to a shopping cart.
- **Select "Proceed to Check Out"**
 - At this point you can add the shipping address (your mail code) and the accounting information or go to the next step.
- **"Assign the Cart" to your supervisor to complete the request.** This form MUST be submitted to your supervisor (per policy.) This step is the supervisor's electronic approval signature for the request. The form will then be sent to the appropriate VP for final approval.

▼ After the Fact Purchase

After the Fact
Purchase

Guidelines and Helpful Hints

1. You cannot request a refund for yourself. It will automatically reject.
 2. The form must be submitted by your supervisor or it will be returned. This is his/her signature which is required by policy.
 3. You can have more than one line on a request. Documentation must be provided for each line on the request.
- IMPORTANT:** State Law requires that the original receipt for an imaged copy to be saved for one year. Please keep the original receipts in your files. (You may be audited.) The imaged copy will be maintained in PAW Place.

For questions and help completing the form: Please contact the Purchasing Office at ext. 6014. See <https://www.weber.edu/purchasing/pawplace.html> for more information.

P-Card: If you make frequent purchases that need to be reimbursed and your department approves, you can request a P-Card for University purchases. Contact Brad Budge for additional information at ext. 7113. Sales tax is exempt from Utah purchases, if the P-card is used to make the purchase. Cash cannot be used for a sales tax exemption.