

How to Set Up Reimbursement Request on ProcureSU

Purpose of This Guide

The purpose of this guide is to help you use ProcureSU's to fill out an online **Reimbursement Request Form**. With this form you can input your reimbursement details as well as submit your itemized receipts and/or list of students who participated in the SUCCESS Seminar experience. Once you complete your form, it'll prompt you to "assign" your "cart". In this case, you will be sending your personal reimbursement to University Core's Senior Administrative Assistant, Maria Reyes (mreyes1@seattleu.edu), to process.

Items You Will Need Before You Process your Reimbursement

Itemized Receipt

- On the itemized receipt it needs to show the following: name of person who is applying for the reimbursement, listing of items purchased + cost, method of payment, and last four digits of the card used.

List of Students/ Participants Who Received Item

- List must include first and last names of students present at event and/or received items

If you don't have your itemized receipt...

- Procure SU also accepts a redacted CC statement. On the statement, it needs to have your bank name, account owner name, transaction line showing transaction date, vendor, and amount charged. Please black out all other private information.

Procurement Training Video:

Linked here is a video on how to complete the Reimbursement Request Form made by SeattleU Procurement: [Reimbursement Request Form Video](#)

Step By Step Guide

Below is a Step-by-Step Guide on How to Complete the Form.

If you need a video reference, we've also included time stamps of the Reimbursement Request Form video that corresponds to the step you are working on.

Step By Step Guide

Step 1: Access ProcureSU

Open the [SU Home Webpage](#). Then click the drop-down red banner menu for [SU Resources]. Then select [Quicklinks].

Once on the QUICKLINKS window, click [PROCURESU]

The screenshot shows the Seattle University website. At the top, there is a red navigation bar with the Seattle University logo on the left and links for Visit, Apply, Give, Alumni, Student Support, SU Resources (with a dropdown arrow), and Search on the right. Below the navigation bar is a white header with links for ABOUT, ACADEMICS, STUDENT LIFE, ADMISSIONS, TUITION AND AID, JESUIT TRADITION, and ATHLETICS. A large blue banner with the text "Transfer to Seattle" is visible. A dropdown menu is open under "SU Resources", showing options: Email, Canvas, mySeattleU, Library, and Quicklinks (highlighted in yellow). Below the banner is a "QUICKLINKS" section with a red and white background. On the left, there is a "SEATTLE UNIVERSITY" menu with links for ABOUT SEATTLE UNIVERSITY, ACADEMICS, ADMISSIONS, CAMPUS MAP, DIRECTORIES, FACULTY AND STAFF RESOURCES, FOSTERING SCHOLARS, and GOVERNANCE. To the right, under the heading "Helpful Links", there is a grid of buttons: MYSEATTLEU & STUDENT PLANNING, CONNECTSU, CANVAS, ENGAGESU, OFFICE 365 EMAIL, INFORMSU, CAMPUS CARD EACCOUNTS, INFORMSU SSRS, LINKEDIN LEARNING, and PROCURESU (highlighted in yellow).

If prompted, login in with your SU credentials

Step 2: Open Reimbursement Request

(If following the Youtube Tutorial, here is the time stamp link: [From 08 to 0:36](#))

On the main page under “Request Forms”, click on [Reimbursement Request]

ProcureSU Update - The Emergency Procurement form and the PO Change Request form have a new look but the content remains the same. Internet Explorer is no longer supported. Please use a different browser when viewing ProcureSU.

Standard Reports - There are four reports saved on everyone's ProcureSU account. These reports show orders in progress or orders which may need something to move forward. Here is a link to a guide on how to get to the reports and what each one looks at.

Issues or Questions? Contact Procurement Services
procurement@seattleu.edu or (206) 296-5882

Invoice or Payment Questions? Contact Accounts Payable
apapyan1@seattleu.edu, strangejoy@seattleu.edu, or frisbied@seattleu.edu

IT Purchasing Questions? Contact Technical Purchasing
TechPurchasing@seattleu.edu

ProcureSU Training and Guides are available [HERE](#).
Commodity Codes: A listing of all codes is [HERE](#).
A guide for the most common object code used based on the commodity code is [HERE](#).
ProcureSU Forms: A flow chart of a recommended form to use is [HERE](#).
The form matrix with descriptions and receiving/invoicing information is [HERE](#).
Standard Reports: A guide to access saved searches with helpful information on orders not yet completed is [HERE](#).

Hosted Catalogs

- BLICK art materials Art Supplies
- WCSOLUTIONS MRO / Facilities

Punch-out Catalogs

- amazonBusiness Specialty
- BH Electronics
- CDWG Computers
- Complete Book Books
- Dyn-Key MRO / Facilities
- Greenleaf Scientific Lab Supplies
- Graybar MRO / Facilities
- IS SUPPLY Maintenance Supplies
- MCK Medical Supplies
- McMASTER-CARR Maintenance Supplies
- Medical Supplies
- odp Office Supplies
- VWR Lab Supplies
- GRAINGER MRO / Facilities

Request Forms

- Annual Payment Form
- DirectPay Request - Under \$500.00
- Independent Contractor Form
- PO Change Request
- ProcureSU Vendor Update Request
- Reimbursement Request**

Step 3: Read Instructions, then hit [Next]

(If following the Youtube Tutorial, here is the time stamp link from [0:36 to :50](#))

When you click [Reimbursement Request], you'll land on the Instructions page.

Go ahead and read.

Reimbursement Request

Form Number: [Redacted]
Purpose: Procurement Request
Status: Incomplete

Instructions

This form is ONLY for Seattle University students, faculty, and staff.
To reimburse non-Seattle University individuals for Travel related expenses - Use the Independent Contractor Form.

Seattle University's intent is to process as much procurement as possible through ProcureSU catalogs and non-catalog shopping. This will allow us to aggregate spend data for negotiation and other purposes. The purpose of this form is to reimburse students, staff, or faculty members when catalogs shopping was not possible and business expenses required use of personal funds.

There are regulatory and business reasons regarding University disbursements that require policies and procedures. The Internal Revenue Service (IRS) has established strict rules governing business and entertainment expenses. The University believes and expects that faculty and staff will exercise prudence and good judgment when incurring expenses on the University's behalf for business activities, and will reimburse employees for legitimate, reasonable and appropriate business and entertainment expenses in accordance with the IRS requirements and University policy. Purchasing using grant funds must also be in compliance with federal regulations.

In addition, Generally Acceptable Accounting Principles (GAAP) is a framework of guidelines and standards for accounting for financial transactions. Our policies and procedures must adhere to these guidelines to account for University transactions for financial reporting purposes. The information required in this Reimbursement Request Form will help you satisfy all these requirements. Reimbursement policies and procedures are under the responsibility and authority of the Vice President of Finance and Business Affairs who must approve any significant changes or revisions. Any questions, revisions, errors, or changes may also be directed to the Controller's Office.

The university's policies on reimbursements can be found on the Controller's Office website.

For moving expense reimbursements, please use the Moving Expense form.

Please reconcile Travel Advances on the original Advance - see Travel Advance Form for instructions.

As a reminder, receiving is not necessary for this form and an invoice will be automatically created in ProcureSU once the requisition is fully approved.

Next

Once you are done, click [Next]

Step 4: Complete Details Page, click [Save Progress], click [Next]

(If following the Youtube Tutorial, here is the time stamp link from [:50 to 1:06](#))

On the Details Page, complete the Form Name field.

- Suggested Format:
Last Name, UCOR #, SUCCESS, Year##Quarter(_Q), Reimbursement Request
- Example: Reyes UCOR 1100 SUCCESS 22FQ Reimbursement Request

Click [Save Progress], click [Next]

The screenshot shows the 'Reimbursement Request' details page. On the left is a navigation menu with 'Details' selected and highlighted in yellow. The main content area shows a form with the following fields: 'Form Name *' (highlighted in yellow), 'Purpose' (Procurement Request), 'Template Title' (Reimbursement Request), 'Form Type' (Reimbursement), and 'Currency' (USD). At the bottom right, the 'Save Progress' and 'Next' buttons are highlighted in yellow.

Step 5: Complete Vendors Page, click [Save Progress], click [Next]

(If following the Youtube Tutorial, here is the time stamp link from [1:25 to 2:02](#))

On the Details Page, complete the Form Name field.

Click [Select] for

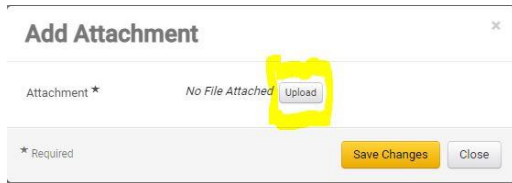
“Personal Reimbursement fulfillment: (preferred)901 12th Ave, Seattle, WA 98122”

Click [Save Progress], click [Next]

The screenshot shows the 'Vendors' page with a table of fulfillment centers. The table has columns for 'Vendor Name', 'Doing Business As', 'Fulfillment Centers', 'Additional Vendor Distribution Data', and 'Action'. One row is visible with 'Personal Reimbursement' as the vendor name and 'Controller's Office, 901 12th Ave, Seattle, WA 98122' as the fulfillment center. The 'Select' button in the 'Action' column is highlighted in yellow.

Step 6: Insert Attachments on Attachments Page, click [Save Progress], click [Next]
(If following the Youtube Tutorial, here is the time stamp link from [2:03 to 3:16](#))

A) On the Attachments Page, click [Upload]

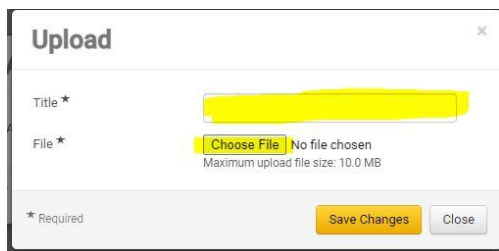


The screenshot shows a dialog box titled "Add Attachment". It has a close button (X) in the top right corner. Below the title, there is a label "Attachment *" followed by the text "No File Attached" and a yellow-bordered button labeled "Upload". At the bottom of the dialog, there is a legend "* Required" and two buttons: "Save Changes" and "Close".

- On the Upload window, complete the Title field
 - Suggested Format: Last Name, YearQuarter(##_Q), SUCCESS, Document Type
 - Example 1: Reyes 22FQ Meal Receipts
 - Example 2: Reyes 22FQ Bus Receipt
 - Example 3: Reyes 22FQ List of Students

B) After completing the Title field, click [Choose File], then select the file to upload.

C) After you upload, click [Save Changes].



The screenshot shows a dialog box titled "Upload" with a close button (X) in the top right corner. It contains two main fields: "Title *" and "File *". The "Title" field is highlighted with a yellow box and contains a redacted name. The "File" field has a yellow-bordered button labeled "Choose File" and the text "No file chosen" below it. Below the "File" field, it says "Maximum upload file size: 10.0 MB". At the bottom of the dialog, there is a legend "* Required" and two buttons: "Save Changes" and "Close".

Repeat steps A-C to attach any other document needed to process your reimbursement.

Once you are finished attaching all documents, click [Save Progress], then click [Next]

Step 7: Complete Form Fields's [Information] Section, click [Save Progress], click [Next]

(If following the Youtube Tutorial, here is the time stamp link from [3:18-3:57](#))

Under the Name & SU ID

Complete "Payee" and "Payee SU ID" fields. (i.e, the person who paid)

Then select [Yes] to "Is the payee a University employee i.e., (faculty, staff or student staff)?"

Under Type

Under "What type of reimbursement is this?" select [Non-travel]

Note: Even if the expense is for an in-state field trip, it'll be categorized as non-travel.

Once finished, click [Save Progress], then click [Next]

The screenshot shows a web interface for a Reimbursement Request. On the left is a sidebar with navigation options: 'Reimbursement Request' (selected), 'Instructions', 'Details', 'Vendors', 'Attachments', 'Form Fields', and 'Review and Submit'. The main content area is titled 'Form Fields - Form Fields' and contains several sections: 'On This Page' with a link to 'Response is Required', 'Name & SU ID' with a text input field containing 'Marta Reyes' and a 'Payee SU ID' field containing '123456789', a radio button question 'Is the payee a University employee i.e., (faculty, staff or student staff)?' with 'Yes' selected, and a 'Type' section with radio buttons for 'Travel', 'Non-Travel' (selected), and 'Both'. At the bottom right are three buttons: 'Previous', 'Save Progress', and 'Next'.

Step 8: Complete Form Fields's [Non-Travel] Section, click [Save Progress], click [Next]

(If following the Youtube Tutorial, here is the time stamp link from [7:10-8:18](#))

Under Non-Travel

Complete "What is the business reason for the reimbursement?" field.

- Include details such as what the reimbursement was for, the date, who was involved, what was purchased, and any other notes.

Next, selected an option on "How many different types of expenses are being requested for reimbursement?" field.

- Note: A type of expense is a single item or a group of items that are classified the same. Examples of expense type would be meals, event tickets, transportation expenses, gift cards, classroom supplies, etc.

Then, complete "Reimbursement amount for the first type:"

- Note: The number you selected for "How many different types of expenses are being requested for reimbursement?" will determine how many types of cost you will input

Finally, click the checkbox of "Required Items are attached" to indicate you included all required documents.

Once finished, click [Save Progress], then click [Next]

Here is an example of how we completed Form Fields for a UCOR SUCCESS seminar experience

Let's say we took UCOR 1100 students to Lake Washington for an outing on 9/20/2022.

The items bought for reimbursement are as follows:

Doughnuts from Mighty O Doughnuts: \$15

Beverages from Wholefoods: \$10

Bus Tickets: \$10

In this case we have two types of expenses

1. Meals: \$25 (Doughnuts \$15+ Beverages \$10 =\$25)
2. Transportation: \$10

I would then complete the form fields as follows:

Reimbursement Request

Form Number: [Redacted]
Purpose: Procurement Request
Status: On Document

Instructions
Details ✓
Vendors ✓
Attachments ✓
Form Fields ✓
Information ✓

Non-Travel Expenses ✓

Review and Submit

Form Fields - Non-Travel Expenses Request Actions History Y

★ Response Is Required

Non-Travel

What is the business reason for the reimbursement? *

Part of the UCOR SUCCESS seminar experience. Took UCOR 1100 students to Lake Washington on September 20th, 2022. List of students who participated attached. Bought doughnuts from Mighty O Doughnuts and beverages from Wholefoods for their meals. Purchased bus tickets, and we took the bus from Seattle U and back.
1567 characters remaining

How many different types of expenses are being requested for reimbursement? A type of expense is a single item or a group of items that are classified the same. An example of an expense type would be meals, office supplies, or advertising. *

2

Reimbursement amount for the first type:

Unit Price	25.00	USD	Quantity	1	Total	25.00 USD
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Reimbursement amount for the second type:

Unit Price	10.00	USD	Quantity	1	Total	10.00 USD
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Please attach receipts or other documentation. Meals and in store purchases require an itemized receipt. Items bought over the internet require a receipt showing details about the items, proof of payment, and shipping confirmation *

Required items are attached

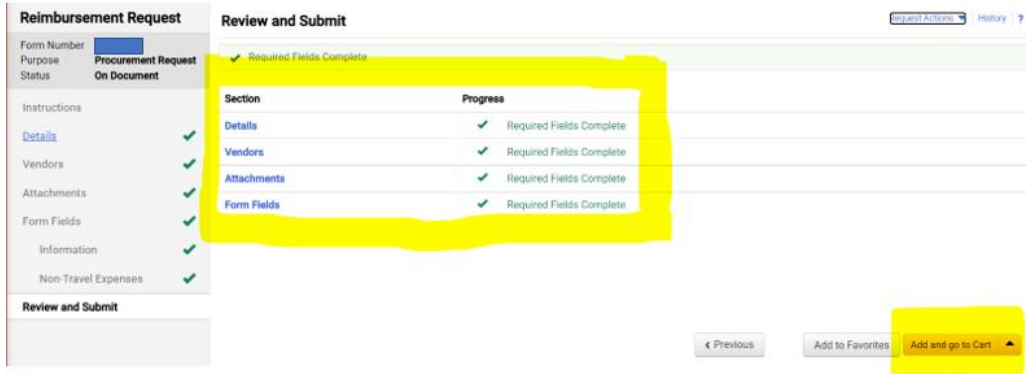
Previous Save Progress Next

Step 9: Complete the Review and Submit Section, click [Save Progress]

(If following the Youtube Tutorial, here is the time stamp link from [8:19 to 9:30](#))

On this page, you should automatically have green checks next to each section you've completed. If it's not checked, you must go back to that section and complete it in order to proceed forward.

When all fields are marked as completed, click [Add and go to cart]

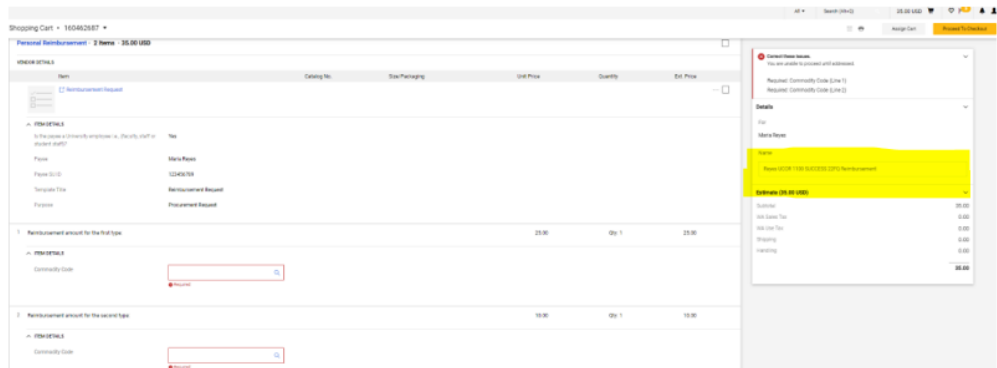


Step 10: Complete the Shopping Cart, then Assign the Cart

(If following the Youtube Tutorial, here is the time stamp link from [9:36 to 10:06](#))

Under "Details" on the right column, complete the [Name] field to name your cart.

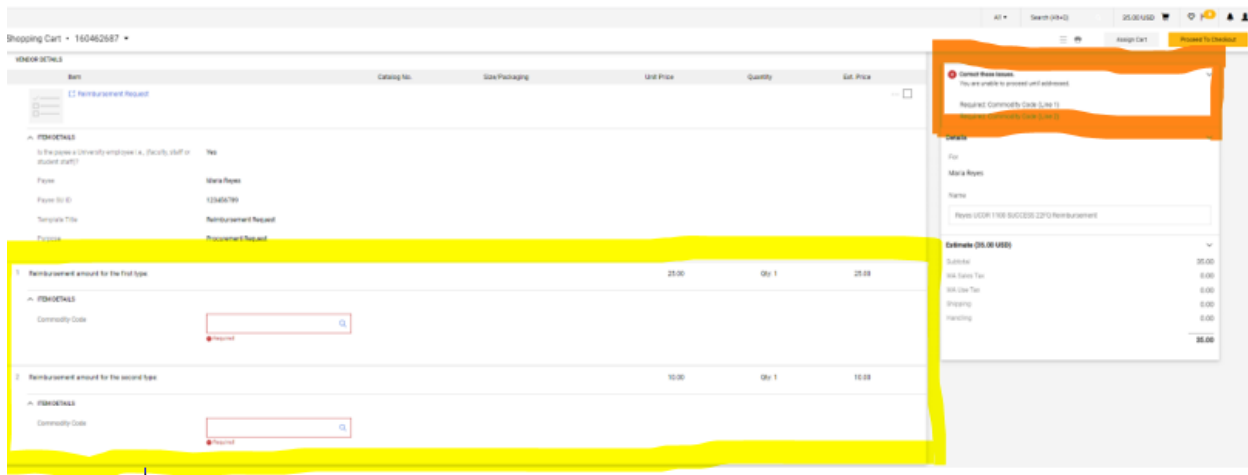
- Suggested Format: Last Name, UCOR #, SUCCESS, Year##Quarter(_Q), Reimbursement Request
- Example: Reyes UCOR 1100 SUCCESS 22FQ Reimbursement Request



Complete Commodity Codes Fields

(If following the Youtube Tutorial, here is the time stamp link from [10:07 to 11:35](#))

In the right column, you'll notice a notification to "Correct these issues. You are unable to proceed until addressed" (Highlighted in orange in the example below). To correct this, you would need to complete the commodity code(s) (Highlighted in yellow in the example below)



Complete the commodity code for the first type. Click the magnifying glass inside the red block.

1 Reimbursement amount for the first type:

ITEM DETAILS

Commodity Code

Required

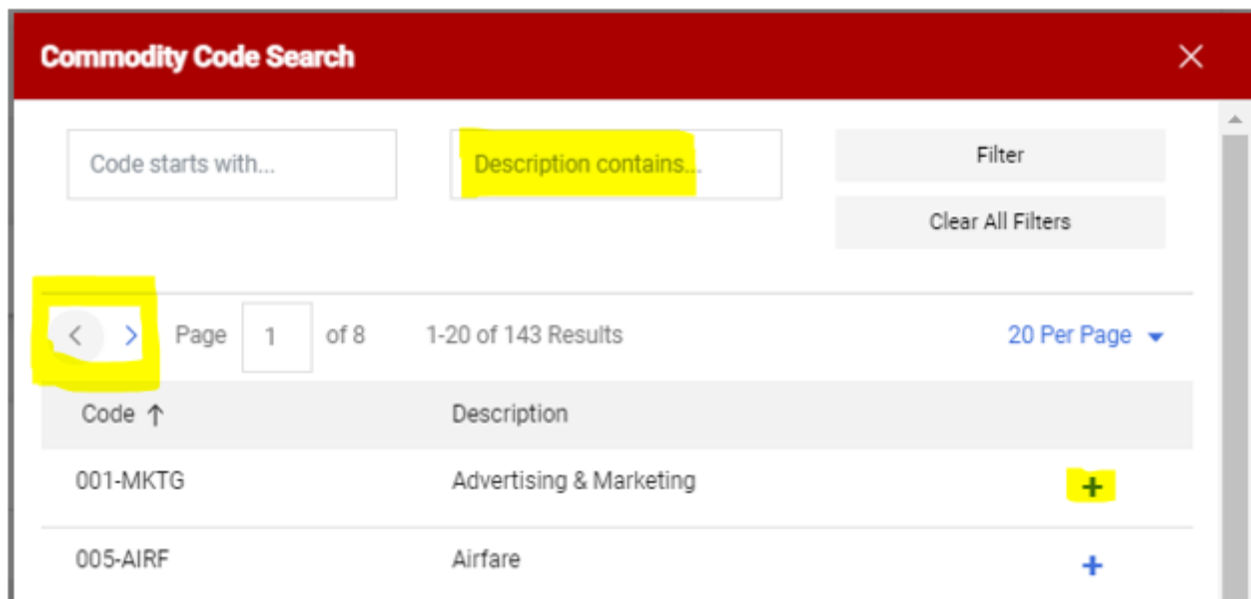
This will open to a “Commodity Code Search” window.

You can select commodity codes by searching under the fields “Description contains...”, then click [Filter]

Or, you can scroll through the list of codes using the left and right arrows.

Once you find the corresponding code for the reimbursement type, click on the blue + sign.

If there is more than one reimbursement type, you would also need to complete the coding for those as well



Here are example of commonly used common commodity codes used for past SUCCESS Seminar reimbursements:

Code	Description	Examples
240-MEAL	Meals/Food & Beverage	Coffee/Snacks/Lunch
070-ENTR	Entertainment	Movie/Musical tickets
570-TRAN	Transportation	Bus/Ferry tickets
465-SART	Supplies-Arts/Crafts	Craft/Paint kits
175-GIFT	Gift Card	Café/Restaurant cards

If you would like to see the full list of commodity codes, here is the link:

<https://www.seattleu.edu/media/procurement-services/Commodity-Code-Handout-20210519.pdf>

Step 11: Assign Cart

To receive your reimbursement, you would need to “assign” your “cart” to the University Core’s Senior Administrator Assistant so that they can process it.

In the case for FY 22RQ-23SQ, that would be Maria Reyes (mreyes1@seattleu.edu)

On the top right corner click [Assign Cart]

The screenshot shows a shopping cart interface for a 'Personal Reimbursement' with 2 items totaling \$35.00 USD. The 'Assign Cart' button is highlighted in yellow in the top right corner. The main area displays 'VENDOR DETAILS' and 'ITEM DETAILS' for two items. The first item is 'Reimbursement amount for the first type' with a unit price of 25.00 and quantity of 1. The second item is 'Reimbursement amount for the second type' with a unit price of 10.00 and quantity of 1. A summary panel on the right shows the total estimate of \$35.00 USD, broken down into Subtotal, Wa Sales Tax, Wa Use Tax, Shipping, and Handling.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1			25.00	Qty: 1	25.00
2			10.00	Qty: 1	10.00

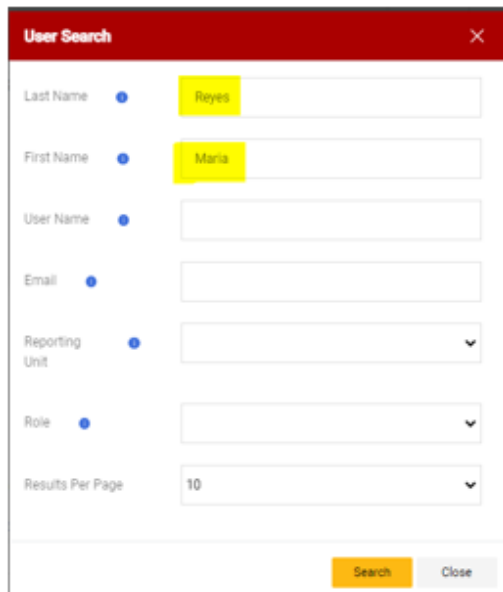
Under the “Assign Cart: User Search Window”, click [SEARCH]

The screenshot shows the 'Assign Cart: User Search' window. It has a red header with the title and a close button. The main content area contains the following fields:

- Assign Cart To:** A text field containing the text 'no value' and a yellow button labeled 'SEARCH'.
- Note To Assignee:** A large text area for entering a note.

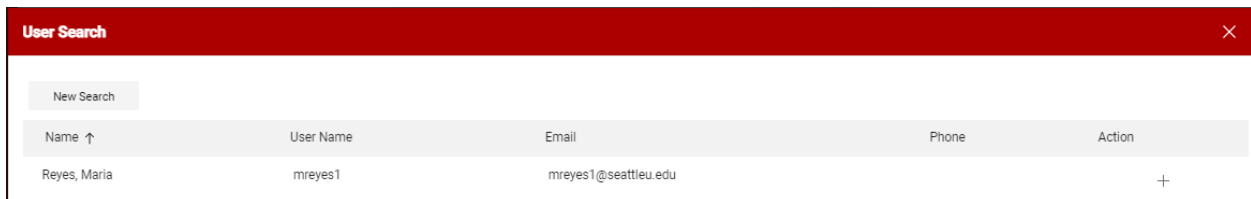
At the bottom right, there are two buttons: 'Assign' (highlighted in yellow) and 'Close'.

To assign the cart to the UCOR's Senior Administrator's Assistant,
Enter their Last (Reyes) and First (Maria) Name.
Then click [Search].



The 'User Search' dialog box features a red header with a close button. It contains several input fields: 'Last Name' with 'Reyes' entered, 'First Name' with 'Maria' entered, 'User Name', 'Email', 'Reporting Unit' (a dropdown menu), 'Role' (a dropdown menu), and 'Results Per Page' set to '10'. At the bottom, there are 'Search' and 'Close' buttons.

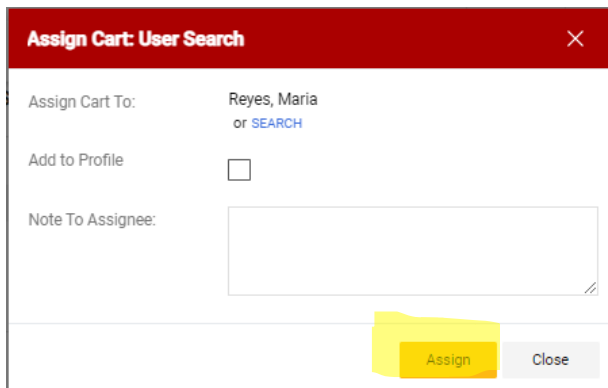
Once the Senior Administrator Assistant has been found, click on the [+]



The 'User Search' dialog box displays a table with the following data:

Name ↑	User Name	Email	Phone	Action
Reyes, Maria	mreyes1	mreyes1@seattleu.edu		+

Under the "Assign Cart: User Search", click on [Assign]



The 'Assign Cart: User Search' dialog box has a red header with a close button. It shows 'Assign Cart To:' as 'Reyes, Maria' with a 'SEARCH' link below it. There is an 'Add to Profile' checkbox which is unchecked. A 'Note To Assignee:' text area is present. At the bottom, there are 'Assign' and 'Close' buttons.