


# ESE Guide: Purchase Request Form

A guide to filling out the [UW Connect Finance Purchase Request form](#) so our Purchasing Team can make purchases on your behalf. It has instructions for fields that are commonly asked about and ESE tips. View the various topics via the Bookmarks panel (open with this  button).

## Requester's Information


Instructions will be in these speech bubbles.

### Who is this request for?

Myself  Someone else

If the request will be shipped to you, select "Myself". If not, select "Someone else" and enter their UW NetID.

### \* UW NetID

Enter the UW NetID of the individual for whom you are submitting.   
For UW NetID lookup, most users can be found by searching in the [UW Directory](#).  
Note: **UWNetID@uw.edu** is Email address shown on UW Directory results.

nevin11

### Contact Number

206-685-2699

### Shared Environment

College of Engineering Shared Environment

Verify this says "College of Engineering Shared Environment."

### Would you like this support request routed to a different shared environment other than the default one above?

Yes  
 No

Click "No," unless "College of Engineering Shared Environment" is not shown above.

### \* Email

nevin11@uw.edu

# Purchase Detail

## \* What is the employee status?

- Staff
- Faculty
- Student

## \* Who approved this purchase? ⓘ

Please provide a UW NetID. ✕

If you are authorized to purchase, provide your own NetID; otherwise, provide approver's UW NetID.

Attach proof of approval, if applicable, per your departmental policy.

## \* Is this a Machinery & Equipment (M&E) Purchase? ⓘ


Please find information about M&E purchases [here](#) ✕

## \* How does this purchase qualify?

## \* Associated Department or Unit

## \* UW Business Purpose for this purchase

If using a grant, please attach PI approval at the bottom of the form.

 **ESE Tips: M&E**

M&E purchases allow for tax exemption.

Do you qualify?

- Is this equipment?
- Does it cost >\$200?
- Does it have a useful life of >1yr?
- Will it be used >50% annually on qualifying research & development?
- For more information, see the [Equipment Inventory Office site](#).

Type M&E statement or add as an attachment at the bottom of the form.

For examples, visit [EIO](#).

• Clearly explain why the purchase is needed. How will it be used? How does it benefit the UW?

• If using a grant, also include a “Benefit to Grant” statement on how it benefits the grant specifically.

Example: “Purchasing widget X to be used in equipment Z to benefit the research of project Y.”

# Ship-to Address

**\* Receiver Contact Name**

**\* Address Line 1**

**Address Line 2**

**Address Line 3**

**\* City**

**\* State/Province**

**Country**

**\* Zip Code**

**\* Is this a home address?**

Include Building Name,  
Floor, Room #.  
  
The more information,  
the better.

# Purchase Information

## \* What is the total amount? ⓘ

Enter amount in dollars and cent without "\$" and ",". (Example: 1550.25) ✕

5000.00

## \* Purchase Line Items

Add

Remove All

Actions	Item	Description	Supplier	Item URL	Quantity
	Computer monitor	27" monitor	Dell	URL GOES HERE	4
	USB Dock Hub	Dock hub	CDW	URL GOES HERE	2

\* Click here to confirm the line items in the table match the Total Amount.

The total line items from the table match the Total Amount

## Total Amount

5000.00

## \* Are there multiple funding sources needed?

Yes

## \* Please provide details below ⓘ

Include percentages and funding sources details, cost center, grant, program, project, or gift ✕

- Approximations here are okay. If unsure, you can enter 1.00.
- If the total amount is ≥\$10k, there may be sourcing requirements. If applicable, the ESE team will reach out to discuss these requirements.

Click the “Add” button to enter line items. See **next page** for pop up box instructions.

Checking this box is required, but the amounts do not have to match entirely.

Describe how to split the worktags. You can use percentages or amounts.

### Add Row x

**\* Item**

**Description**

**Supplier**

**Item URL**

**\* Quantity**

**Unit Cost**

**Unit of Measure**

**\* Total Cost ⓘ**

Short name from vendor site. Enter SKU/Item # if applicable.

A brief description of what the item is.

Copy and paste the URL if available, it is very helpful to our team.

If unsure, use "Each."




**ESE Tips:  
Total Cost**

Final costs may vary based on changes in price on the vendor's site.

If it's over a 10% difference, the ESE will contact you to confirm final total costs.

## Funding Source


At minimum, a user must provide a Cost Center and Resource (to charge your department, etc.). Otherwise, another driver worktag can be provided (e.g. Grant). If you are unsure, please check with your Shared Environment to ensure the Worktag you've provided is a driver. 

If you have a FAS budget# that is used for this activity, you can reference the [Budget to Worktag Mapping Workbook](#) to see what Worktags might apply.




### Company

 UW1861 University of Washington  



### Driver Worktag Type

Cost Center + Resource 

### Driver Cost Center

 CC103200 Engineering ...  

### Driver Resource

 RS100216 General Ope...  

## Optional Worktags

### Adhoc Activity



### Assignee



### Adhoc Program



### Workorder



### Adhoc Stand-Alone Grant



• Company can be UW1861 or SOM depending on where your worktags reside.


• A driver worktag is required. If unsure what worktag to use, contact your PI or department fiscal staff.

 **ESE Tips:**  
**Optional Worktags**

These would be additional worktags that are provided to you, if applicable.

# Customer Watch List

## Add Watchers

Please enter the name of the person you'd like to add to the customer watch list 

## More Information

### Additional Comments

## Attach Files


**Do not attach documents containing confidential, personal, or restricted data in accordance with [UW Privacy data classifications](#).**

 Add Attachments

SUBMIT 

- This is like an email “CC:”.
- You can add as many as needed.
- If their name can’t be added, type their email address in the Additional Comments below.

- If not attaching an approval and you have current written delegated spend authority on file in your department, state that here.
- Add any other information for the Purchasing Team.

 **ESE Tips: Attachments**

- Approval for purchase. Grant approvals should be from the PI.
- Do not attach email file formats directly (e.g. .MSG/PST/EML files). Please print these to PDF and attach.
- Quotes or screenshots of your shopping cart from the vendor’s site are helpful.
- M&E Statement if not already provided in the form above.