When scanning/emailing receipts to finance.cmp@wsu.edu

- **Makes sure receipts have the required information**:

  1) Name of merchant
  2) Date of transaction
  3) Item description and price
  4) Separate line for tax (if applicable)

- **Keep one copied receipt per page** as they will be submitted with each transaction in Workday (Unless they are related to each other, like a product return)

- **If possible, forward the electronic receipt from the vendor** as the team often needs to be able to access the vendor hyperlinks provided on the email.

- **In the Subject line detail the vendor name and last name of the P-card holder** (Amazon Receipt – Smith)**.**

- **In the body of the email or on the copied receipt page be sure to:**

  - **Add brief description if necessary and/or what it is for** (Imagine if it were being reviewed by an auditor; would it be clear what the purchase was?)
  - **Include Program, Gift or Grant account detail as well as whose P-card was charged.**

- **Send receipts/invoices only when goods/services are received**.

  - To streamline the verification process, since it is very important that transactions are not verified until they are physically received, receipts submitted will be assumed to have been received. That eliminates the need to send packing slips.
  - This will also ensure that the correct receipt is submitted for verification. Many times, orders are shipped separately and therefore charged separately so the transactions don't align with the original order. It is also common for the final amount being charged having changed from the original order due to taxes and shipping being estimates only until final processing.