Receipt, Inspection, and Acceptance of Purchased Goods

NOTE: The website URL for Workday reference guides that are referenced in this section is: https://confluence.esg.wsu.edu/display/WKB/Workday

OVERVIEW

When departments receive equipment and supplies purchased from outside suppliers, the person in the department receiving the goods updates the status of the item as received in Workday.

EXCEPTION: At WSU Tri-Cities and WSU Vancouver, the central receiving unit updates the status of the item received in Workday. See WSU Tri-Cities and WSU Vancouver.

See the Workday Create Receipt reference guide for instructions on updating the status of the item as received when the shipping company or the campus central receiving unit delivers items to the department that placed the order.

Receiving Orders

WSU Pullman
At the WSU Pullman campus, Central Receiving and Delivery usually delivers the merchandise to the requisitioning department.

WSU Spokane
At WSU Spokane (WSUS), the Mail Services, Shipping and Receiving department receives shipments from outside suppliers. Mail Services, Shipping and Receiving delivers the merchandise to the requisitioning department.

WSU Tri-Cities
At WSU Tri-Cities (WSUTC), the Shipping and Receiving department receives shipments from outside suppliers. In addition to inspecting and logging received shipments into Workday, the WSUTC Shipping and Receiving department maintains a database which includes received shipment information, e.g., date received, tracking number, receiving person, and/or department.

WSU Vancouver
At WSU Vancouver, the Mailroom department receives shipments from outside suppliers, completes receiving reports, and logs received shipments into Workday.
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WSU Vancouver (cont.)

The Mailroom department usually delivers the merchandise to the requisitioning department.

Other Non-Pullman Locations

Shipping companies deliver merchandise directly to other non-Pullman units. As such, unit personnel are responsible for checking-in merchandise.

Non-Pullman units are to follow the procedures in the Workday Create Receipt reference guide to update the status of an item as being received.

Problem Shipments

Central Receiving and Delivery is available upon request to assist non-Pullman units with problem shipments.

Paying for Orders

Accounts Payable is authorized to pay an invoice when goods are received and recorded in Workday. In addition, the department must reconcile the goods purchased by procurement card in Workday. (*BPPM 70.08*).

Authorized department personnel must input receipt of goods information in order to ensure that invoices are paid. NOTE: The campus central receiving unit performs this action at WSU Tri-Cities and WSU Vancouver. (See *WSU Tri-Cities* and *WSU Vancouver*).

Accounts Payable matches the information in Workday with the supplier's invoice.

Accounts Payable attempts to take advantage of all incentives offered by suppliers for prompt payment.

If only part of an order is received, Accounts Payable pays for items actually received only.

CAMPUS CENTRAL RECEIVING UNITS

Inspecting Shipments

The campus central receiving unit checks incoming shipments for the number of packages indicated on the freight bill.
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Damaged and Unsatisfactory Shipments

If it is obvious to campus central receiving unit that a shipment is damaged, central receiving personnel notify the carrier and make the appropriate claims. Immediate action is necessary to comply with the time limits set by carriers for filing damage claims. The campus receiving department must be notified of damage within five working days of receipt of purchased goods in order for damage claims to be processed in a timely fashion.

If the damage is not discovered until after delivery to the requisitioning department, the department must notify the campus central receiving unit within five working days of receiving the merchandise. The department is to preserve all portions of the container and wrappings, which are inspected by the delivery carrier before the claim is filed.

The central receiving unit makes every effort to inspect incoming shipments for damage, however, hidden damage is the financial responsibility of the receiving unit. Timely inspection and receipt of goods into Workday is essential.

Receiving Shipments Through the Central Receiving Department

Upon receipt through the campus central receiving unit, the requisitioning department is to immediately check all merchandise. The department verifies that the merchandise meets the specifications of the order and has not been damaged in shipment. If the merchandise is acceptable, a departmental representative creates a receipt for goods in Workday. Verifying the receipt of the merchandise indicates to the central receiving unit and Accounts Payable that the shipment was received in good condition. See the Workday Create Receipt reference guide for instructions.

Department Purchase Order / Department Requisition Purchases

For items purchased with requisitions in Workday, department personnel record the receipt of order information in Workday. See the Workday Create Receipt reference guide.

WSU Pullman

All department personnel have Workday access to create a receipt of goods or service.

WSU Tri-Cities

WSU Tri-Cities department personnel notify WSUTC Shipping and Receiving of receipt of items purchased on a department requisition by e-mailing:

copyctr@tricity.wsu.edu

See WSU Tri-Cities.
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Procurement Card Purchases

The cardholder is responsible for inspecting the shipment. See BPPM 70.08 for information regarding disputes/discrepancies. See BPPM 70.08 and below for information regarding damaged shipments and returning merchandise.

Problem Shipments

Incomplete

If the packing list indicates a partial shipment, indicate the items received in Workday. Workday automatically creates a back order. The supplier is paid only for items received.

If the packing list indicates a missing item was shipped, the department is to indicate in Workday what was actually received and what item the supplier indicates as shipped.

The department corresponds with the supplier to correct the discrepancy.

Damage

Do not throw anything away. Save the outer box with the shipping label (especially UPS tags) and the inner packing material, then complete the following steps:

1. On the packing list, star the damaged item(s), indicate the damage, and the action being taken.

2. Contact the supplier to report the damage and request a Return of Merchandise Authorization (RMA) number.

3. Complete a Request for Shipment of Merchandise form (BPPM 80.15). Enter the RMA number on the form where indicated.

4. Put the original or a copy of the packing list with the Request for Shipment of Merchandise and the damaged items. Contact the campus central receiving unit for pickup.

The campus central receiving unit calls the delivery carrier and ships the damaged order back to the supplier.
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<table>
<thead>
<tr>
<th>Wrong or Defective Merchandise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicate in Workday which items were received and whether any items are defective or wrong. Indicate whether replacement or cancellation of the order is desired, then complete the following steps:</td>
</tr>
<tr>
<td>1. Prepare any wrong items for shipping and fill out a Request for Shipment of Merchandise form (BPPM 80.15).</td>
</tr>
<tr>
<td>2. Put the mail-ready merchandise, a copy of the packing list, and the Request for Shipment of Merchandise form together and contact the campus central receiving unit for pickup.</td>
</tr>
<tr>
<td>3. Correspond with the supplier regarding replacement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overage</th>
</tr>
</thead>
<tbody>
<tr>
<td>An overage is the shipment of more items than requested by the department.</td>
</tr>
<tr>
<td>If the packing list indicates an overage, indicate in Workday whether the overage is to be retained, then complete the following steps:</td>
</tr>
<tr>
<td>1. If the overage is not to be retained, prepare the excess items for shipment and complete a Request for Shipment of Merchandise form (BPPM 80.15).</td>
</tr>
<tr>
<td>2. Put a copy of the packing list, the Request for Shipment of Merchandise form, and the mail-ready overage together.</td>
</tr>
<tr>
<td>3. Contact the campus central receiving unit for pickup.</td>
</tr>
<tr>
<td>The department corresponds with the supplier regarding return of the material.</td>
</tr>
<tr>
<td>If the packing list does not indicate the overage, indicate in Workday whether the overage is to be retained. If the overage is not to be retained, prepare the shipment as described under Wrong or Defective Merchandise.</td>
</tr>
<tr>
<td>If the overage is to be retained, indicate this in Workday.</td>
</tr>
<tr>
<td>The department contacts the supplier to request invoicing.</td>
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</tbody>
</table>

Assistance

The campus central receiving unit assists departments with problems upon request.
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**DIRECT RECEIPT BY DEPARTMENT**

Sometimes a shipping company delivers items directly to a department or department personnel pick up items from a supplier. The department must promptly report receiving any orders sent directly to or picked up by the department. The department promptly indicates receipt of the items in Workday.

**Departmental Requisition Purchases**

If the merchandise is originally purchased through Purchasing with a regular department purchasing requisition in Workday enter the Purchase Order number onto the supplier's invoice. A departmental representative signs the invoice indicating receipt of the merchandise. The department routes the invoice directly to Accounts Payable for payment.

**WSU Tri-Cities**

WSU Tri-Cities departments notify the Shipping and Receiving department by e-mail to:

copyctr@tricity.wsu.edu

Department personnel or the campus central receiving unit record the information regarding receipt of merchandise in Workday. See [WSU Tri-Cities](#).

**Supplier Contract Purchases**

If the merchandise is originally purchased from an off-campus supplier using a Supplier Contract (see [BPPM 70.19](#)), enter the Supplier Contract number and the appropriate WSU account coding on the supplier’s invoice.

An individual with expenditure authority for the indicated account signs the invoice and routes it directly to Accounts Payable.

**Procurement Card Purchases**

Follow receiving procedures in [BPPM 70.08](#) when using a department procurement card to purchase from a non-University supplier.

**Department Purchasing Order Purchases**

Follow receiving procedures in the Workday Create and Change Purchase Order reference guide when using a department purchasing order to purchase from a non-University supplier.

**Confirming Requisition Purchases**

Complete a confirming requisition to receive and pay for items not originally purchased using other standard purchasing procedures ([BPPM 70.20](#)).