



Orem, UT 84058

Purchasing Card Approval Process

- 1. Make sure each transaction is tax-exempt
 - a. Tax-exempt forms attached
 - b. You may need to print and submit copy of tax-exempt forms to vendor/restaurant
- 2. Tips need to be included in the approval request
 - a. 10% tip limit
 - b. Total approval request cost needs to include tip cost
 - c. Meal cost approved: Breakfast, \$10, Lunch \$12, dinner \$15, Snacks \$3
- 3. Itemized Receipts are required and must include:
 - a. Vendor Name
 - b. Date
 - c. Item Description(s)
 - d. Unit Price
 - e. Transaction Amount
 - f. No Utah Sales Tax
- 4. Gift cards not allowed (\$ value to it: \$5 Starbucks gift card)
 - a. Vouchers are allowed (no \$ value: 1 free drink voucher)
- 5. Executive approval (Barney Nye) for admission or ticket purchases.
- 6. Make sure admins have entered student activities into Compass before submitting report.
- 7. Attach required documents in Concur in the listed order:
 - a. For non-student activities purchases:
 - i. Itemized receipts (check for tax)
 - ii. Approvals
 - b. For student activities:
 - i. Itemized receipts (check for tax) receipt(s) associated with expenditure
 - ii. Approvals
 - iii. Event Checklist (check compass entries box)
 - iv. Sign-in sheets
- 8. Expense Types
 - i. Check for accuracy, some vendors default to a category that may not apply to your purchase. All food/drink should be a Food/Luncheons expense.
 - b. Index Codes
 - i. GEAR UP Funds: G20051
 - ii. PBA Funds: S11549
- 9. When ready to submit, email the Budget Manager with a request to review.
 - a. Once the Budget Manager has notified you of their review then submit report.
 - b. Your submitted report will then automatically go to your supervisor for approval.
- 10. Statement will go through UVU approval process.