

Purchasing Card (Pcard) 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 all expenditures
 - i. Itemized receipts (check for tax)
 - ii. Approvals
8. Attach required documents in your BOX file in the listed order:
 - i. Itemized receipts (check for tax)
 - ii. Approval
 - iii. Event Checklist
 - iv. Sign-in sheets (Compass entries confirmed)
9. 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
10. Have Admin III and supervisor review
 - a. Email Admin III first informing her your statement is ready for review. After being reviewed you may submit your report.
 - b. Admin III's statement will be reviewed by Budget Manager
11. Supervisor will let PCard owner know when it's ready to submit.
12. Submit your report
13. Statement will go through UVU approval process