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PCARD Expense Report Process

https://my.uvu.edu/workplace/procurement/docs/purchasing-card/pcard-manual.pdf

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. 15% 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. Make sure admins have entered student activities into Compass before submitting report.
6. 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. Event Checklist Approval (check compass entries box)
        iii. Sign-in sheets and Compass Report
7. Expense Types
    i. Check for accuracy, choose expense type that fits your event.
8. Index Codes
    i. GEAR UP Funds: G20052
    ii. PBA Funds: S11549
9. When ready to submit, email the Budget Manager with a request to review, CC immediate supervisor.
    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.