PCard Transactions: Documenting Business Purpose

As with check requests and travel reimbursements, all PCard transactions must include a statement to justify the purchase. It is essential that cardholders, approvers, auditors, and the program administrator understand the circumstances under which you made the purchase and why it was necessary.

Your brief, accurate, and complete description of the business purpose should be clear enough that a person outside the College could read it years from now and have no question about the business purpose of the expense.

Use the “Comments” section of the “Sign Off” dialog box to add your justification.
- **Who** attended or received the benefit from the expenditure
- **What** purpose the expenditure served
- **Why** the expense was necessary
- **How** it furthered the College’s goals
- **When** and **where** the expense took place

Approvers are expected to look for a receipt and business purpose when signing off on cardholder transactions.

PCard Updates

A successful PCard program requires team effort. We’re all on the same team. Below are some tips to help keep the process move smoothly.

- When approaching a vacation, holiday, or medical leave of absence, remember to consider your responsibility to reconcile transactions.
- When an employee provides notice of resignation, PCard purchases halt to allow ample time for transactions reconciliation.
- When making purchases from Amazon, use the College’s Amazon Business Account, which includes institution-wide free 2-day shipping and is exempt from PA sales tax. If you don’t currently have access to the account, ask purchasing staff to send an invitation.
- For restaurants, the detailed receipt should be attached to the transaction.
- Contact Bank of America to inquire about declined transactions. They will be able to provide an immediate reason for the decline.
- For temporary credit increases, please check our PCard website for detailed instructions.

PCard Team Deadlines

The PCard program has experienced exceptional growth! With 220 cardholders and $2.3 M spend per year, we are pleased to see the popularity of the program.

In order to maintain the integrity of the program and manage it appropriately, we ask that cardholders comply with the sign off deadlines. Check transactions frequently to allocate expenses, attach receipts, indicate business purpose, and sign off on your transactions. If you are a heavy user, it would be advisable to check Works several times per week to stay on top of your transactions. When cardholders complete their duties early, the baton is then passed to approvers with sufficient time to complete their responsibilities on time.

Approvers are advised to check the Works several times per week as well. As an approver, if you are experiencing difficulty managing your role, or you notice your cardholders are late on a regular basis, please contact Pat Hearty for ideas to improve compliance.