



Purchasing Card User Training Assessment Form:

To ensure that key Purchasing Card policies and procedures are clearly understood and followed, please complete this training assessment form.

| USU Purchasing Card Policies and Procedures The complete policy can be viewed online at http://www.usu.edu/purchasing/pcard/index.cfm . | Check the appropriate box for each question | |
|--|--|---------------------------------|
| | I have a clear understanding | I need additional clarification |
| 1. I understand that I need to obtain and keep an itemized receipt for every purchase, whether on campus or off campus. An itemized receipt identifies each item purchased, as well as whether sales tax was charged. | | |
| 2. I understand that I am responsible to make sure that Utah sales tax is not charged on any purchase. (Tax exemption # 11895815-002-STC imprinted on the P-Card.) | | |
| 3. It is my responsibility to make sure that my monthly P-Card statements are reconciled by matching the itemized receipts to the charges shown on the statements and that I, as Cardholder, must sign the reconciled statements. I may assign the reconciliation process to someone else, as long as I continue to sign and date the reconciled statements. | | |
| 4. I understand that my reconciled statements must be reviewed and signed by my administrator (immediate supervisor). Administrators can delegate the review process to someone else as long as that person does not report to me. | | |
| 5. Meals or entertainment charges require a Meals and Entertainment Form to be completed and kept with the itemized receipt. USU Policy #516 "Meals and Entertainment" explains the requirements and includes a link to the form. | | |
| 6. I may allow someone else to use my card after a P-Card Delegation Form is completed and the selected user attends P-Card training. I understand that I am responsible for all purchases made with my card. | | |
| 7. I understand that I am not allowed to make personal purchases using the P-Card. | | |
| 8. I understand that employee travel expenses are not allowable P-Card charges. Employee travel costs are approved and reimbursed via the Travel Authorization process. | | |

Please list any additional comments and topics that would help to improve this training session.

P-Card User Signature

Date _____

Telephone # _____

P-Card User Printed Name

Email Address _____