

STUDENT AFFAIRS' SECRET

to Taming the P-Card
Receipt Tsunami

SHARING POINTS

Managing P-Card receipts in Student Affairs can feel overwhelming, but the secret lies in streamlined processes and smart digital tools. By implementing automated receipt tracking, clear guidelines, and proactive training, departments can reduce chaos, improve compliance, and save time. A combination of mobile capture apps, centralized reporting, and timely reconciliations ensures that the P-Card process remains efficient and stress-free.

designated
receipt
attacher

receipt
requirements

how we
organize our
BOX files

notifications
management

card
suspension
process

DESIGNATED RECEIPT ATTACHER

Time Saving Tip:

Use Reference Number to link your purchase to a specific event, travel, or vendor. Doing so aids in quick searches and streamlines tracking.

* Description

summarize purchase (i.e. decorations)

[Reference Number](#)

event (i.e. 2025 Howl)



[Qualified Approval](#)

Student Affairs has a level 10 position processing 10,000+ receipts annually, ensuring purchases are allocable, appropriate, & allowable.

Verifying each has the following:

- * itemized w/description
- * vendor name * purchase date
- * total amount * card used
- * name of the purchaser (if different from the cardholder)
- * reason for purchase * cardholder signature
- * expenditure index *TA# (if purchase was for travel)
- * sales tax has been removed

RECEIPT REQUIREMENTS

SHOULD BE ON RECEIPT
 itemized w/description
 vendor name
 purchase date
 total amount
 card used
 NO sales tax

ADDED BY USER
 name of the purchaser
 reason for purchase
 cardholder signature
 expenditure index
 TA#

Receipt

Index: *A13865*

Account Code: *713600*

Reason for purchase:
Expo marker orders

Signature: *[Signature]*

Date Paid: *1/15/25*

Last 4 Digits of Card #: *3823*

Check yes if this is for a gift or award: Yes

If yes, will G&A Form be submitted?: Yes No *exempt per Division guidelines

Where will goods be stored until awarded?:

SCANNED
1/20/2025



ADDED BY USER:
 Whether it's on a full sheet or at the top of a receipt, we require all necessary information to be included.

Payment summary

Thank you for your request. Please find your order details below

Transaction ID: 3678488588

Transaction Date: 01/15/2025

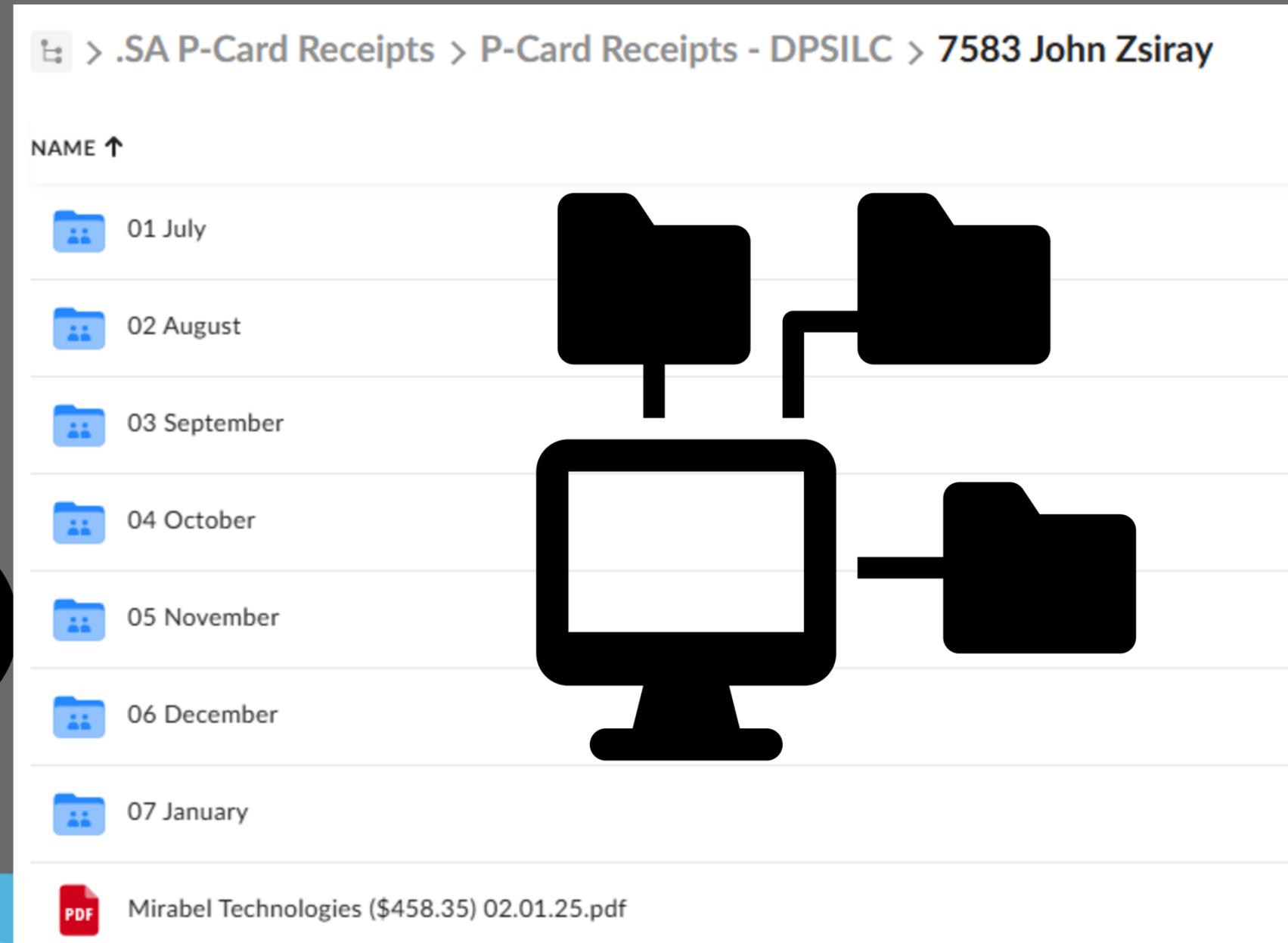
Split:
A30487 - \$40.01
A33497 - \$40.01
Internet Hubs for SILE offices

Payment details

Billing account **Total payment**
 (bills submitted: 1 account) **\$ 80.02**

Account number	Payment date	Payment method	Payment amount	Status
842231979-00001	01/15/2025	LZ All	\$80.02 (Remaining balance \$ 0.0)	Success

HOW WE ORGANIZE OUR BOX FILES



NAMING CONVENTION:

TA# vendor name (amount) date of purchase
vendor name (amount) date of purchase

NOTIFICATIONS MANAGEMENT

Weekly reminders

Sent from:

Receipt Processor

Send to:

Cardholder

Business Manager

30 Day Warning

Sent from:

Business Manager

Send to:

Cardholder

Director

Suspension Notification

Sent from:

Business Manager

Send to:

Cardholder

Director

Vice President

Financial Officer

ALL NOTIFICATIONS ARE SENT FROM OUR
BUSINESS SERVICES **NO-REPLY** EMAIL

WEEKLY REMINDER WORDING



The following transactions listed are currently awaiting documentation for processing. Please upload all receipts and documentation to Box as soon as possible. An item on this list may be waiting for more documentation, please see your Box Tasks for specific instruction. Contact your [Business Manager](#) with any questions regarding processing procedures or what documentation may be needed to complete the transaction record.

[Receipt Processing Instructions](#)

(insert receipt(s) list)

 ACTION: Weekly Transaction Reminder

 Send weekly

Sent from:

Receipt Processor

Send to:

Cardholder

Business Manager

30 DAY WARNING WORDING

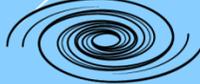


The following transactions listed are currently outstanding. Per Student Affairs procedure, it is generally expected that receipts be uploaded to Box for processing within 2 business days of the purchase. Please upload your receipts as soon as possible with all appropriate documentation to avoid suspension of all cards in your name and the purchasing ability for your department. If these transactions fail to be recorded in a timely manner, it could mean cancellation of your cards and revoked purchasing capabilities. Please contact your [Business Manager](#) with any questions regarding these procedures or what documentation may be needed to complete the transaction record.

[Receipt Processing Instructions](#)

(insert receipt(s) list)

 ACTION: WARNING p-card SUSPENSION

 Send when transactions are 30 days old with no action.

Sent from:

Business Manager

Send to:

Cardholder

Director

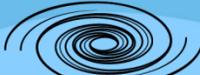
SUSPENSION WARNING



The following transactions listed are currently outstanding. As these transactions are more than 6 weeks old and have not had a receipt turned in for processing, all University P-cards in your name will be suspended until all of the outstanding receipts can be turned in and recorded appropriately. Per Student Affairs procedures, it is generally expected that receipts be uploaded to Box for processing within 2 business days of the purchase. Please upload your receipts by the end of the day today with all appropriate documentation to avoid cancelling your cards and forfeiting the ability to make purchases on the behalf of your department in the future. As a reminder, if you make purchases with your own funds during a time when your P-Card is suspended for failure to follow policy, these purchases will NOT be reimbursed. Please contact your [Business Manager](#) with questions regarding these procedures or what documentation may be needed to complete the transaction record.

[Receipt Processing Instructions](#)

(insert receipt(s) list)

 ACTION: P-CARD SUSPENSION TODAY

 Send when transactions are 45 days old with no action.

Sent from:
Business Manager

Send to:
Cardholder
Director
Vice President
Financial Officer

CARD SUSPENSION PROCESS

Purchasing Card Change Request

Request one or more changes to a P-Card

Change Options

Options

- Change Monthly Transaction Limit
- Change Single Transaction Limit
- Change OCC Transaction Limit
- Change Default Index
- Change Default Account Code
- Suspend Card
- Cancel Card
- Convert to P-Card

Suspend Card

* Reason

Other (please explain)

* Other (please explain)

The purchasing card has been temporarily suspended due to the cardholder's inability to adhere to established procedures.



**QUESTIONS?
LET'S DISCUSS!**