P-Card Checklist

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| **All Purchases:** | |
|  | An original, itemized invoice/receipt is provided for each charge, including credits. Order confirmation forms, cancelled checks, copies of bills, or billing/credit card statements are not considered a receipt. |
|  | A printed transaction total is shown on each invoice/receipt that matches the amount shown in Skyward. |
|  | Sales tax has been paid on all eligible purchases or “CT” is selected for the transaction in Skyward. |
|  | Missing receipt forms are filled out only after an attempt has been made with the vendor. If transaction receipt cannot be provided, a Missing Receipt Form is filled out and signed by the supervisor and employee or secretary. |
|  | All charges are for official district business. (There are no personal charges.) |
|  | All shipping addresses are sent to a School District address. |
|  | The report is signed by cardholder and supervisor. |
|  | ASB purchases include a prior approval form with the purchase. |
| **Travel Purchases:** | |
|  | A copy of the signed Trip Approval Request form is provided with all overnight travel purchases. |
|  | A copy of the event flyer and/or agenda is provided with all overnight travel purchases. |
|  | Food purchases while in travel status only include student travel and include names of attendees. |
|  | Rental vehicles are mid-size, cost is under $80/day and includes insurance. Any upgrades are paid on a personal card. |
| **Food Purchases:** | |
|  | Restaurant receipts show a detail of the food ordered. |
|  | A list of meal attendees (sign in sheet if applicable) and the purpose of the meeting/meal (agenda if applicable) has been provided for all food purchases. |
|  | The total of the restaurant receipts are less than or equal to per diem including any mandatory gratuities. |
|  | Meals on the p-card are prohibited while in travel status. |