Purchasing Card Cheat Sheet

**Cardholder**

- A Pre-Approval form must be completed by the cardholder and signed by the approver prior to processing a P-Card purchase.

- After the purchase is processed, wait for the PeopleSoft notification email to arrive. Once the email has arrived, the cardholder can reconcile the charge.

- The reconcile page can be entered through the link in the notification email, the “work list” link in the top right corner of the PeopleSoft home page, or the following navigation: Purchasing–Procurement Cards–Reconcile–Reconcile Statement.

- Correct account number and speed key is entered.

- When a cardholder reconciles a charge, a comment describing the purchase must be entered.

- The following documents must be attached in PeopleSoft when reconciling:
  - The itemized receipt
  - Signed pre-approval form
  - Signed travel card log
  - Any other supporting documentation (spending freeze exemption, credit, emails from vendor, etc.)

- Once the cardholder saves the charge in PeopleSoft, the system is locked. The Coordinator for Card Services and AP Manager have access to edit data or attach additional files if needed.

**Approver**

- After the cardholder saves the charge in PeopleSoft, a PeopleSoft notification email is sent. Once the email has arrived, the approver can approve the charge.

- The reconcile page can be entered through the link in the notification email, the “work list” link in the top right corner of the PeopleSoft home page, or the following navigation: Purchasing–Procurement Cards–Reconcile–Reconcile Statement.

- Ensure the correct data is entered:
  - Speed Key and account number
  - Comment describing the charge
  - Attachment containing all supporting documentation

- Contact the Coordinator for Card Services and AP Manager to edit data or attach additional files if needed.