

## Agency P-Card Purchases

In order to make a purchase using the Agency P-Card, the following steps must be taken. Adhering to the procedures will allow for a more efficient transaction time. Prior to processing the request, please make sure your Agency Account Approval Form is up-to-date with the proper authorized signatures. Only authorized personnel are allowed to approve Agency P-Card purchases.

- If applicable, all purchases for Gifts/Prizes/Awards must have prior approval from the Controller's Office. The Reporting Form for Gifts/Prizes/Awards must be signed by the recipient and returned to the Accounting Office. A copy of the pre-approval form must be attached with all other documents.
- Also, if applicable, all items containing any type of Agency or ATU logo, must be pre-approved through Robohead, and a copy of the approval attached with all other documents.
- Complete *P-Card Order Request* form, include all required information on the form
  - Department Name
  - Contact name and phone number
  - Shipping address
  - Agency Fund and Account number
  - Vendor name, website, & phone number
  - Username and Password
  - Description of items, quantity, price, shipping & handling, tax, and total
  - Purpose of the order
  - Requested by: Authorized Signature
  - Approved by: Authorized Personnel Signature
- Attach supporting documentation
  - Supporting documentation must be attached to the request form, all documents must list the items & purchase amounts.
- Obtain Agency funding approval from the Accounting Office, Browning Hall – 312.
- Purchase is then completed by the P-Card holder.

Please make sure that all information is filled out, signed by authorized persons, & supporting documentation is attached, including any pre-approval forms listed above, before delivering to the Accounting Office for funding approval. All incomplete requests will delay the process.

Option #1 All complete documents can be emailed to [accting@atu.edu](mailto:accting@atu.edu) in Accounting for funding approval, Accounting will then forward the request to the P-Card holder to pay for the requested items. All on-line purchases processed in this manner must have the requesters username and password to the web-site, and all items must be placed in the web-site's cart and be ready for payment.

Options #2 A computer is set-up in the Accounting Office, Browning Hall – 312 for the Agency Representative to enter their order. Bring all complete documents to the Accounting department for funding approval. Enter the order on the computer, then the P-Card holder will verify the order with the request form and purchase items requested. Option #2: it is requested that the Agency Representative contact Myra Rollans, [mrollans2@atu.edu](mailto:mrollans2@atu.edu) to set-up a time for processing this type of request.

Additional information and forms are located at [www.atu.edu/controller](http://www.atu.edu/controller).