



Procurement Card Guidelines

Header Naming Convention

- Use the format [BILLING CYCLE MONTH-FIRST 3 LETTERS ONLY] [YYYY] P-Card (e.g., "JUL 2017 P-Card")



Billing Cycle

- Use the Correct Monthly P-Card Billing Cycle Dates
- Submit by the 10th of each month. Approving Official must approve to be considered submitted



Business Purpose

Your business purpose must clearly answer:

- How does it support the institutional goals or the department?
- **Who** - Identifies the individuals or groups for whom the expense is meant.
- **What** - Describes the action, event, or expense items being purchased.
- **When** - Specifies the time or date of the event or action, if applicable
- **Where** - Indicates the location or place where the event or action took place, if applicable.
- **Why** - Explains the reason or motivation behind the expense.
- Abbreviations or acronyms shouldn't be used.





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Business Purpose

Poor Business Purpose Examples:

- Tournament and membership fees



Better Business Purpose Examples:

- \$200 tournament fee and \$100 bid application fee for the 2025 spring semester debate student team(s) to participate in the American Forensics Association (AFA) National Debate Tournament (NDT). A \$85 AFA membership fee was required to participate in the tournament.



Receipts and Documentation

- Itemized Receipt (includes date, vendor, items, and totals)
- Proof of Payment (credit card confirmation, paid invoice etc., with Itemized purchases)
- **NOTE:** Totals should match the receipts





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Pre-Approved Documentation

Approved Hospitality Justification Form

(formerly known as D-11) for Food, Entertainment, Gifts, Promotional Materials, and more:

- [Hospitality Justification Form](#)

For a quick guide, use the [Hospitality Requestor Checklist](#)

When a valid exception occurs outside the hospitality policy:

[Hospitality Authorization for Exception to Policy Form](#)

IT Authorization Number is provided for technology/software purchases.

- Check requirements Accessible Technology Initiative (ATI) Compliance and Review.
- May REQUIRE: [ATI REVIEW- Click here for a list of Consumables](#)
- [ATI REVIEW](#)
- REQUIRES: [View C&P FAQs to learn more about Q#'s](#)

Q#'s can be obtained by emailing: eBusiness@fullerton.edu

[Approved Service Providers and Approved Caterers List](#)

Lost/Missing Receipts submit the [Lost/Missing Receipt Verification Form](#)





Procurement Card Guidelines



Check for Correct Chartfields

- Check for Correct Chartfields
- Allocate Different Fund Sources (if necessary)
- Ensure Purchases are Itemized.



Clear All Red Errors & Review Yellow Warnings

- Clear all Red Errors (or else you cannot submit)
- Check all yellow warning signs, and this will not prevent you from submitting, but it will warn you to be aware of discrepancies.
- Submit for Approval When Ready



Key Reminders

- Use the Comments Box to add any additional info to provide clarity on items that are not clear to help expedite the process and a detailed business purpose.
- Be proactive, reach out to the team for best business practice or best solutions before purchasing.
- Include itemized receipts or provide the lost/missing justification form, if vendor cannot be reached.