

Pework Checklists for Purchasing Card Transactions

Pework before making the Purchase

- Internal Use form – must be signed by **PROGRAM MANAGER** or **WORKTAG OWNER**
- Emails for approval if form cannot be signed in person (dates must be before the purchase is made)
- If it is a host expenditure, host form needs to be filled out and signed before purchase (if a host form already exists for event, make sure to have it and that the purchasing limit has not been gone over)
- Review the policy before making larger than normal purchases

Pework for P-card verification

- All back up from before making the purchase
- Receipt for the purchase – receipt needs to show that it was made by GBC employee p-card
- Add location to additional worktags

Pework Checklists for Travel

Pework for Spend Authorizations

- **Spend Auth must be completed 14 days prior to travel**
- Traveler must complete Traveler Form
- Excess per Diem Form must be completed if hotel is over the GSA rate
- Vehicle Non-Availability form completed if necessary (first signed by controller's office then supervisor)
- If taking a GBC vehicle, ensure that the employee's defensive driving and driver acknowledgement form has been completed. The driver will need their driver's license to check out vehicle

Pework for Expense Reports

- All forms from Spend Authorization
- Receipts for expense being claimed outside of per diem
- Conference schedule for per diem
- If taking own car, map from campus to destination

Pework Checklist for Host Expenditures

- Host form should be completed 15 days prior to the event (including determining if the PG is a host account or host eligible)
- **PROGRAM MANAGER** or **WORKTAG OWNER** must be the one to sign the form (email approval will suffice if form cannot be signed in person. Dates need to be before purchases are made)
- When verifying the transaction, add the detail code and your location to the additional worktags section