

Dear colleagues,

Communication to all Purchasing Cardholders, Coder and Authorisers for Action

As we return to more 'normal' ways of working we are seeing an increase in the use of purchasing cards again.

This email is to set out expectations around the coding and authorising of purchasing card expenditure. Other expectations are set out in the [Purchasing Card Declaration](#) which was re-sent to all cardholders last month.

Attaching receipts

It is important that authorisers have the information they need and that receipts are safely retained in an accessible form for HMRC and research funder purposes. For these reasons we are now requiring all cardholders to attach receipts to their purchasing card transactions in the finance system, as for out of pocket expenses.

Review, coding and authorisation

It is important that cardholders check their statements regularly to identify any potential mis-use, as for their personal cards. To update budgets for their expenditure it's important to be aware that

[Purchasing Card Guide](#)

_____ will result in your card being
withdrawn from use.

In the meantime we have created some additional training material in the form of E-Learning courses: Approving Purchasing Card tasks (5-10 minutes) and Coding Purchasing Card tasks (10-15 minutes). These courses can be accessed via [LearnUpon](#),

funder requirements where applicable, as they are committing University funds.

- Cardholders are to ensure that the transactions on their card are accurately coded and authorised by the 10th of each month.
- When completing the task, cardholders must:
 - o Populate the RESNO field when appropriate (e.g. conference, travel or accommodation), to ensure that the authoriser is not directly benefitting from the purchase. If there are situations where this is unclear (e.g. a meal that the authoriser attended with others) please contact the [Finance Service Desk](#) for advice.
 - o Ensure all supporting information is attached. Attach receipts line by line in the system, unless there has been agreement with the authoriser to attach all receipts to one line of the statement.
 - o Overwrite the auto description of the purchase with accurate details of what was purchased and why.
- Coders