



**SNOHOMISH
SCHOOL
DISTRICT**

Purchasing Department

1601 Avenue D
Snohomish, WA 98290

P-Card Training Checklist

Purpose: Provide card users an overview of the P-Card Process

Instructions: Discuss each bullet point, initial that each item has been discussed, obtain the necessary signatures and send checklist with signed Memorandum of Agreement to the Purchasing Department. The user cannot use the card until you have received approval back from the Purchasing Department.

- Obtain budget approval for each purchase (use the Purchase Requisition form)
- Check out / in the card each time you use it
- Overview of acceptable/unacceptable uses (see P-Cards at a Glance and/or P-Card Manual)
- Using the Card
 - Online
 - Verify the site is secure
 - Print **itemized** order confirmation
 - Email / Fax / Phone
 - Obtain **itemized** order confirmation / or receipt via fax or email
 - In Person
 - Bring District ID in case required
 - Obtain **itemized** receipt
- Staple itemized receipts / order confirmation to Purchase Requisition and turn in **daily**
- Ensure card security "Treat the card as if it was your own".
- The user agrees by signing the Memorandum of Agreement to abide by all purchasing regulations and agrees to reimburse the District and/or authorizes the District to withhold from his/her payroll check, the value of any purchase that is made contrary to the purchasing regulations.

School / Department: _____

Card Custodian: _____ Date: _____

Card User Signature: _____ Date: _____

Budget Supervisor / Principal Approval: _____