

DRAKE UNIVERSITY

Purchasing Card Program Guidelines

Last Updated: November 2017

General

The purpose of the Program is to streamline and simplify the purchasing and payment process for small dollar purchases and/or travel and entertainment expense.

The Program is designed to:

- Reduce the cost of processing small dollar purchases
- Receive faster delivery of goods and services
- Simplify the payment process
- Provide Cardholders with a convenient method to pay travel and entertainment expense
- Provide process efficiency in the reconciliation and approval of expense transactions

This document will provide you with the guidelines of the Program, including:

- [Card Issuance](#)
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Card Issuance

A purchasing card may be issued to authorized University employees upon approval by a Budget Manager, Dean/Director, or President's Council member. Purchasing cards should only be issued to employees who have a specific need to make purchases on behalf of the University in the normal course of business.

A request for a new card can be made by completing the [Purchasing Card Application & Agreement Form](#). On this form an Approver for the card must be designated. The Approver is responsible for reviewing the Cardholder's allocation of the charges, verifying that all purchases are within University policies and procedures, and ensuring appropriate documentation has been attached to each transaction. Approvers should not be under the direct supervision of the Cardholder and should have signing authority for purchases made on behalf of the department.

The completed application should be submitted to the Program Administrator at pcard@drake.edu. The Program Administrator will process new card requests within 7 to 10 business days from receipt of the completed application form.

The Program Administrator will receive the new card and complete the Cardholder's Visa Intellilink account set-up. Following the completion of the Cardholder's account set-up, two emails will be auto

generated and sent directly to the Cardholder with log in credentials. One email will provide the Cardholder's user ID and the second email will contain a temporary password. The Cardholder will be asked to create a memorable word during the initial log in process. A user guide is available in the PCARD FORMS & RESOURCES section located at <http://www.drake.edu/busfin/formsresources/> to assist with this step.

Following the account set-up the Program Administrator will notify the Cardholder their procurement card is ready to be picked up from the Accounting Office. The Cardholder will be required to present a form of ID at the time of card pickup.

Upon receipt of the new card, the Cardholder will need to activate the card by calling the toll-free number presented on the back of the card. For verification purposes, the Cardholder will be asked for a verification code, which is the last four digits of the Cardholder's social security number. Because the card is chip enabled, the Cardholder will also be required to set up a four digit PIN number. This PIN number should be retained by the Cardholder in the event it is needed to complete a purchase transaction. All Cardholders are required to sign the back of the card after activation.

Card Usage

The Cardholder is expected to use the card exclusively for University business. Personal use of the card is not allowed under any circumstance. All purchases should comply with other University policies and procedures including, but not limited to, the Purchasing Card Program Guidelines and the Accounts Payable Guidelines (available on the Drake/Finance and Administration website).

The Cardholder is the only individual authorized to use the issued card and is responsible for all charges against the card. Transferring the card to another individual is prohibited.

The Cardholder is responsible for monitoring card activity for any unauthorized charges. In the case of a discrepancy or fraud, the Cardholder is responsible for contacting the vendor and/or PNC Bank to report and resolve the issue. See Credits, Disputed, or Fraudulent Transactions section below for reporting procedures.

Limitations and Restrictions

For security measures, all purchasing cards have an assigned monthly credit limit and a single transaction limit. If an attempt is made to purchase beyond the card limits, the card will be declined. A purchase may not be split into multiple transactions to stay within card limits. For purchases that may exceed set limits, a temporary increase in limits can be made upon written request from the Cardholder's approver to the Program Administrator. The written request must include the reason for the increase, proposed temporary limits, and the time period for which the change is needed.

To aid in fraud prevention, Merchant Category Control (MCC) groups have been established by the University and PNC Bank. The MCC groups include vendor categories that have been approved or restricted for University purchases. If a particular MCC is blocked (e.g., jewelry stores), and you attempt to use your card at such a merchant, your purchase will be declined. The University has made an effort to ensure that the vendors/suppliers generally used during the normal course of business are not restricted.

If a card is declined, the Cardholder may contact the Program Administrator to determine the reason for decline and options for decline resolution.

Reconciliation and Approval of Purchases

Users are required to access the Program's system, Visa Intellilink, via the Internet to complete monthly reconciliation and approval of transactions. You will receive login credentials for the Visa Intellilink website once the Program Administrator has completed your account set-up.

It is the responsibility of the Cardholder to ensure monthly reconciliation of purchase transactions. Reconciliation of purchases includes the submittal of itemized receipts and other required supporting documentation, documentation of a valid business purpose for each transaction, review of card activity, and resolution of discrepancies with the vendor or PNC Bank. Required documentation must be submitted by the Cardholder electronically through the Visa Intellilink website. A valid business purpose must be documented in the narrative box for each transaction. The description should also include the names of people in attendance if applicable. Itemized receipts and other supporting documentation as outlined in the Accounts Payable Guidelines must be attached to each transaction within the Visa Intellilink website.

It is the responsibility of the Cardholder's Approver to ensure all card transactions are approved monthly. Approval of transactions signifies that the Cardholder was authorized to make such purchases on behalf of the University, purchases were made in accordance with University policies and procedures, and all required supporting documentation was submitted appropriately. Approvers should question and report purchases that do not appear to be in the best interest of the University/Operating Unit. This is not always an easy task. However, misuse of a card, or using it for non-university purposes, is fraud. As an Approver, not reporting such situations is condoning fraud. Inappropriate transactions should be reported to University leadership and/or the Program Administrator.

Monthly statement cycles end on the 20th of each month. At the end of a statement period, users will be notified via email as a reminder to complete appropriate reconciliation and approval of transactions. Cardholders and approvers will be able to make changes/provide approvals through the statement cycle and up until the second to last day of the month following the end of the statement period. (i.e. statement period ends on July 20, updates/approvals will be allowed through July 30th.)

Delegation of Responsibilities

The reconciliation and approval of procurement card transactions can be delegated to another person. Note, delegation does not authorize the delegated person use of the Cardholder's procurement card.

Cardholder Delegation –

The Cardholder's designated approver will be required to email the Program Administrator at pcard@drake.edu indicating who they are delegating the Cardholder's responsibilities to. The Program Administrator will create an account for the delegated person and assign them to the Cardholder. The delegated person can then act on behalf of the Cardholder in regard to reconciliation of the Cardholder's transactions. The delegate is expected to review and follow the guidelines as set forth in this document; as well as, the Purchasing Card Policy.

Approver Delegation –

A designated approver can delegate the approval responsibilities to another person. The current designated approver will be required to email the Program Administrator at pcard@drake.edu indicating who they are delegating their approval responsibilities to. Also, the designated approver needs to have the delegated approver complete the Purchasing Card Approver Agreement and attach it to the email. The Program Administrator will create an account for the delegated approver and assign them as the

approver for the Cardholder. The delegated approver is expected to review and follow the guidelines as set forth in this document; as well as, the Purchasing Card Policy.

Retention of Documents

Monthly statements and supporting documentation submitted through the Visa Intellilink website will be available to the users for twelve months. Monthly transactions and submitted supporting documentation will be retained by the Accounting Office in accordance with University retention policies and procedures.

Account Maintenance

The following requests should be submitted via email to pcard@drake.edu by the Cardholder's designated approver:

- Temporary card limit changes
- Default coding changes
- Departmental changes
- Approver and or delegate changes

The following requests should be submitted via email to pcard@drake.edu by the Cardholder.

- Name change
- Cancellation of card

The following requests can be submitted via email to pcard@drake.edu or by calling your Program Administrator.

- Password resets for the Visa Intellilink website (*you can also call your Program Administrator for this request*)
- Requesting your Visa Intellilink access be unlocked

All other requests and or inquiries can be directed to your Program Administrator at pcard@drake.edu. Your Program Administrator will inform you if any further action is needed (i.e. approval for your request)

Lost or Stolen Cards

The Cardholder is responsible for the security of the card and continual monitoring of card activity for unauthorized use. If a Cardholder believes the card has been lost or stolen, the Cardholder should immediately notify PNC Bank Customer Service at 1(800) 685-4039 if in the US and 706-644-3224 if outside the US. Cardholders should also notify the University's Program Administrator. The card will be disabled at the time it is reported to the bank as lost or stolen. A new card will be issued and mailed to your Program Administrator.

Credits, Disputed, or Fraudulent Transactions

If an item needs to be returned for any reason, Cardholders can send them back to the vendor in a manner mutually agreed upon. The vendor should issue a credit for the items that are returned. This credit should appear on a subsequent monthly statement. Documentation for this credit should be supplied by the vendor and kept for reconciliation/retention purposes.

If a discrepancy of charge occurs, the Cardholder is responsible for contacting the vendor to resolve the issue. If the Cardholder is unable to reach an agreement with the vendor, a dispute of the transaction should be reported to PNC Bank and the Program Administrator.

If fraud is suspected, the Cardholder should immediately contact PNC Bank and the Program Administrator.

In the case of a discrepancy or suspected fraud, the Cardholder is required to contact PNC Bank's 24 hour Customer Service Center at 1-800-685-4039 if in the US and 706-644-3224 if outside the US. Following a call to PNC Bank, you will also need to complete the PNC Bank Billing Inquiry form. A copy of the completed form should be provided to the address listed on the form and the Program Administrator.

All disputed and fraudulent transactions are required to be reported to PNC Bank and the Program Administrator within 45 days of transaction occurrence.

Expired or Reissued Cards

A replacement purchasing card will be mailed one month prior to the expiration date listed on the purchasing card. The Program Administrator will send an email when reissued cards are available for pick up in the Accounting office. The applicable Cardholder will need to turn in the expired card at the time of pick up.

Termination or Transfer

The Cardholder is required to surrender the card immediately upon termination of employment, whether for retirement, voluntary, or involuntary reasons. The Program Administrator will cancel procurement cards upon notification of the Cardholder's termination.

Should a Cardholder transfer between University departments, the Cardholder may keep their card upon approval from the new department's Budget Manager, Director/Dean, or President Council Member. An email notification should be sent to pcard@drake.edu indicating the department change and approval.

Revocation or Suspension of Card

The University reserves the right to revoke or suspend a card at any time without the Cardholder's permission. The Cardholder will be notified by the Program Administrator upon such revocation or suspension.

Fraudulent or intentional misuse of the card may result in revocation of the card and/or disciplinary action up to and including termination of employment.

Program Support and Resources

PNC Bank Customer Service representatives are available 24/7, including holidays, at 1-800-685-4039. University Finance staff is available during office hours (8 am–4:30 pm, M-F) at x3392 & x2041 or pcard@drake.edu.

The Procurement Card policy and Purchasing Card Program Guidelines will continue to be available online at <http://www.drake.edu/busfin/financeadministrationpolicies/>.

Access to applicable purchasing card forms and resources can be located at <http://www.drake.edu/busfin/formsresources/>. This includes the purchasing card application and agreements, Pcard Calendar, Cardholder and approver user guides for the PNC Visa Intellilink website; as well as, the purchasing card billing inquiry for disputed transactions.

FAQ

General

Q. Who are the Drake University procurement card administrators and how do I contact them?

A. Meghan Settje ext. 3392 and Jill Burkle ext. 2041 or pcard@drake.edu during normal office hours of 8:00-4:30pm CST.

Q. What are my login credentials for the PNC Visa IntelliLink website?

A. Your Program Administrator will complete your Visa Intellilink account set-up following the receipt of your procurement card. This process will initiate two automated emails. One email will contain your login ID and the other email will contain your temporary password. These communications will also provide a link to the PNC Visa IntelliLink website.

Q. When setting up my account, it is asking me to create a memorable word. What is this?

A. Please reference the Cardholder Guide – Creating a Memorable Word under the PCARD FORMS & RESOURCES section located at <http://www.drake.edu/busfin/formsresources/>.

Q. I am a cardholder/reconciler, how long do I have to update/submit a transaction?

A. Please reference the PNC Pcard Calendar located under PCARD FORMS & RESOURCES located at <http://www.drake.edu/busfin/formsresources/>. This will provide you with the cycle periods and review dates.

Q. How long do I have to update/submit/approve a transaction?

A. Please reference the PNC Pcard Calendar located under PCARD FORMS & RESOURCES located at <http://www.drake.edu/busfin/formsresources/>. This will provide you with the cycle periods and review dates.

Q. After a transaction has been submitted and approved, can changes be made?

A. Yes, a cardholder and approver can make changes to a transaction up to the period close date.

Q. How far back can we view a transaction and image?

A. A cardholder will have access to a year's worth of statements. An admin (i.e. Meghan, Jill, Heather) will have access to two years' worth of statements. PNC does not internally archive beyond 2 years.

Note, the Program Administrator will be doing transactional and image downloads monthly in order to retain the information per Drake University's retention policy.

Q. What is the allowed character count for the narrative or description box for a transaction?

A. Essentially unlimited but PNC recommends keeping it under 100 characters. One reason for this is when downloading reports that include the narrative, the download will only show the first 100 characters.

Q. I have heard Manager, Approver, Reconciler, and Delegate referenced. What are the differences?

A. A Manager and Delegate are PNC terms. Essentially a Manager is an approver and a Delegate is a reconciler.

Q. Are there auto generated reminders that will be sent out monthly to cardholders and approvers?

A. Yes

New Account

The cardholder will receive two email notifications following the completion of the cardholder's account set up. One email notification will have a subject line of Drake Procurement Card Program Password and the other email notification will have a subject line of Drake Procurement Card Username. The sender for both email notifications will be Drake University Program Administrator.

Approver Returned Transactions

In the event the approver directs a transaction back to the cardholder the following email notifications will be sent (within two hours).

Cardholder – you will receive an email notification with the subject line of Drake Procurement Card Information Required. The sender will be Visa IntelliLink Spend Management. This notification is to alert you a transaction you submitted to the approver was returned.

Delegate – you will receive the same email notification as the cardholder.

Note, if you have a delegate assigned to your card, only the delegate will get this notification.

Approver – when the cardholder returns the transaction you will also receive an email notification alerting you that the transaction has been returned. The subject line will be Drake Procurement Card Response Made and the sender name will be Visa IntelliLink Spend Management.

Monthly Reminders

There will be five email notifications sent out each month. The email notifications will alert a cardholder they have transactions that need to be submitted, and the approver will be alerted they have

transactions that need to be approved. If a user has already submitted all their transactions, or approved all their transactions you should not receive these notifications.

The notifications will be sent out on the 22nd, 27th, 28th, 29th, and 30th of each month.

Cardholders – the email notification will have a subject line of Drake Procurement Card Action Required and will have a sender name of Drake University Program Administrator.

Approvers – the email notification will have a subject line of Drake Procurement Card Approval Notification and will have a sender name of Drake University Program Administrator.

Cardholder/Delegate

Q. When will I see a transaction on the PNC Visa IntelliLink website?

A. Transactions will take a few days, typically 2-3 days, to post to the website (a day or two to post and then a day or two to load to the website). However, this is also dependent on how fast the merchant completes and posts the transaction. Hotel and rental cars, for example, can take a week.

Q. Why do I not see transactions needing attention on my home page?

A. The only time a transaction will appear on the home screen as needing attention is if it has a red 'X'. This means there is missing required inputs. As you make transactions your required inputs are defaulted per how we set you up. Thus you won't be missing this information and the transaction will not show as needing attention. However, you are still required to review all transactions. The following is in your user guide "Commercial Card Services Cardholder Guide" and can assist with knowing what the different symbols mean.

- Green Checkmark = signifies coding is complete (and that the approver should have it for review)*
- Question Mark = signifies a default code was populated but the coding still needs to be submitted (you submit it by viewing the transaction and selecting the Save button)*

Q. In what cycle period will my transactions post?

A. The cycle periods will be the same as they were under Wells Fargo. A cycle period will begin on the 21st of the current month and end the following month on the 20th. (I.e. September cycle is 09/21-10/20). Transactions posting on 09/21 through 10/20 will be on the September Cycle Statement. Transactions posting on 10/21 through 11/20 will be on the November Cycle Statement.

Note, if the 20th falls on a Sunday the statement period will close the following Monday.

Q. What options are there for uploading receipt images to the image library?

A. Option 1: Scan the image, saving it to your computer, then use the Upload option within the transaction's Image Linking screen.

Option 2: Confirmations received via email from the vendor can be copied/pasted to a word document, or if you have the functionality on your computer you can print the email to a PDF by using the print option "Print to PDF", saving either option to your computer, then using the Upload option within the transaction's Image Linking Screen.

Option 3: Attach a document to an email and send the email, with attachment, to the unique email address associated with your account.

Option 4: Take a picture of the receipt on your mobile device and email the image to the unique email address associate with your account.

Option 5: Scan the image to your Drake email address, then forward the email to your unique email address associated with your PNC account. (This option eliminates the steps to save it to your computer then login to the website, then upload the image)

Q. Can I forward an email confirmation directly to the PNC Visa IntelliLink website using my unique PNC email address?

A. No, emails are not image files and won't be accepted. You would need to screenshot/print the email to a PDF or JPEG file in order to upload it to your PNC website account.

See the Cardholder Guide – Adding Receipt Images under the PCARD FORMS & RESOURCES section located at <http://www.drake.edu/busfin/formsresources/>.

Q. Can an image in the image library be added to multiple transactions?

A. Yes

Note, the easiest way to accomplish this is to utilize the Managed Receipt Images Option. See steps and screen shot below to add an image to multiple transactions.

- *Select Manage Receipt Images under the transaction list.*
- *Locate the image needing added to multiple transactions.*
- *Click on the image and select Manage Receipt Links*
- *Select the box next to each transaction the image should be linked to*
- *Select Save*

11/01/2017	United	Yes	867.66	 
11/02/2017	Tropic Air Limited	Yes	323.00	 

[Manage Receipt Images](#)

1) Select the Manage Receipt Images under the listed transactions.

2) Click on the image you want to add to multiple transactions

3) Select the Manage Receipt Links

Date	Summary	Amount
10/29/2017	Agent Fee	15.00 (USD)

Manage Receipt Links

Transactions

<input type="checkbox"/>	Reference	Date	Image Count	Amount
<input checked="" type="checkbox"/>	Agent Fee	10/30/2017	1	15.00
<input type="checkbox"/>	Delta Air	10/30/2017	1	597.60
<input type="checkbox"/>	Agent Fee	11/01/2017	1	30.00
<input type="checkbox"/>	Agent Fee	11/01/2017	1	15.00
<input type="checkbox"/>	United	11/01/2017	1	867.66
<input type="checkbox"/>	Tropic Air Limited	11/02/2017	1	323.00

4) Check the box next to each transaction you want to link the image to.

5) Select Save and the image will be linked to the selected transactions

Save Cancel

Q. Do I have to scan each receipt individually?

A. If you will need to link each receipt to a different transaction you will need to scan them separately. However, if you have multiple receipts or documentation that will be linked to the same transaction, those can be scanned together.

Q. How do I send images from my mobile device to the unique email address associated with my account?

A. Once you have obtained your unique email address you will add it to your email contacts on your mobile device. When you open a new email select this contact and attach to your email. Send the email. The attachment will automatically be placed in your image library.

Note, receipts sent via attachments in an email will not be automatically attach to a given transaction. The cardholder will still need to login and link the image to the applicable transaction.

Q. Should images be removed from the image library after a certain period of time?

A. It is up to the user's discretion to keep all images in the library or periodically remove them.

Note, following the period close date your Program Administrator will complete an image extract for that period. This will extract all images that have been linked to a transaction (this will not extract images in the image library that have NOT been linked to a transaction). The extract will be stored electronically in Accounting, in compliance with Drake University's retention policy.

Q. I am a delegate, how do I know the cardholder's unique email address associated with their account?

A. Option 1: Reach out to the cardholder and request it from them.

Option 2: View one of the cardholder's transactions, as if you were going to update it, and select the option to attach a receipt. In the Image Linking screen select the Upload via Email option. This will then provide you with the cardholder's unique email address. You must be viewing the Cardholder's transaction in order to obtain the correct email address.

Q. I am a delegate and want to link images from my image library to the cardholder's transaction, is that an option?

A. No, when viewing a cardholder's transaction, as a delegate, you can only view the cardholder's image library. You will not have the option to view your own image library.

Note, you can link images from the cardholder's image library, or you can upload images you have saved on your computer.

Q. What is the process if I do not have a receipt?

A. University policy requires a receipt for all transactions. A cardholder is required to make every attempt available to obtain a receipt for a given transaction. In the event a receipt cannot be obtained please contact your Program Administrator to discuss next steps.

Q. Can a delegate see all the cardholder's transactions regardless of the status?

A. Yes, a delegate will see the cardholder's transactions the same as if they were the cardholder themselves.

Q. I am a delegate, but when I login to the website I don't see all the cardholders I am assigned to. Why is this?

A. You will not see a cardholder unless they have transactions which have posted to the website.

Q. As a cardholder, when viewing a transaction it says No under the Image column; however, there is a green check mark in the first status column (a green checkmark indicates you have saved and submitted the transaction to the approver), is the transaction complete from the cardholder's perspective?

A. While the green check mark, in the first status column, indicates the cardholder has saved and submitted the transaction to the approver, it does not necessarily mean all required information has been submitted. If the receipt isn't attached, and/or the description field isn't updated, the system will still let you submit the transaction to the approver. However, Drake University policy requires a receipt to be attached and a description with the business purpose be included for every transaction. Therefore, it is your responsibility as a cardholder to attach the receipt and update the description as needed, prior to submitting it to the approver. It is then the approver's responsibility to review the transaction and ensure that information has been included before approving the transaction.

Q. What is the process to add a FOAPAL element (i.e. fund, org., etc.)?

A. If a FOAPAL element needs added contact your Program Administrator at pcard@drake.edu.

Q. How do I split a transaction between multiple FOAPALs?

A. Please reference the Cardholder Guide – Coding Transactions, step 7. The guide can be located at <http://www.drake.edu/busfin/formsresources/> under PCARD FORMS & RESOURCES.

Q. How many favorites can be added to each FOAPAL category? If there is a limit what happens if you try to add more than what's allowed?

A. FOAPAL categories can have a maximum of 15 favorites. You will not be able to add anymore favorites once you hit that maximum. In order to add another favorite you would first have to remove an already existing one.

Q. How does the cardholder know their transaction(s) has been approved?

A. When you view your transactions for the applicable statement period you will see a green checkmark in the second status column.

Tran Date	Supplier	Image(s)	Amount Incl	
10/19/2017	Aacp.Org	<u>Yes</u>	1,195.00	✓ ✓ 
10/19/2017	Aacp.Org	<u>Yes</u>	2,390.00	✓ ✓

Q. If an approver submits a transaction back to the cardholder for more information, does the cardholder receive a notification the transaction has been sent back?

A. Yes, the cardholder will receive an email notifying them the transaction has been returned and needs action. However, if a delegate is assigned to the card only the delegate will receive this notification.

Q. After a transaction has been submitted and approved, can changes be made?

A. Yes, a cardholder and approver can make changes to a transaction up to the period close date.

Q. Is there a report you can run, or a statement you can download, which will provide the transaction summary including the FOAPAL and description information?

A. Yes, please reference the Cardholder Guide – Reporting at <http://www.drake.edu/busfin/formsresources/> under PCARD FORMS & RESOURCES.

Q. Can electronic approval be obtained across multiple departments? Example, you have a transaction requiring the use of another department’s FOAPAL.

A. Similar to the previous program, only the assigned approver can approve transactions. Departments should utilize existing business processes for obtaining approvals from other departments for purchases made on their Pcard.

Approver

Q. Why can’t I see all the cardholders for which I am an approver for?

A. You will only see cardholders that have submitted transactions for approval. If they don’t have transactions or haven’t submitted them for approval, you will not see their name listed under your account.

Q. Can I split a transaction?

A. Yes, please reference the Cardholder Guide – Coding Transactions under the PCARD FORMS & RESOURCES section located at <http://www.drake.edu/busfin/formsresources/>.

Q. If a transaction has been submitted by the cardholder and it has been approved by the approver, what happens if the cardholder then makes a change to that transaction?

A. The transaction's status for the approver (the second column of symbols) will automatically revert back to a red exclamation point signifying the approver needs to review and approve the transaction again.

10/26/2017	Josephs Jewelry	<u>Yes</u>	60.00	 
10/26/2017	Josephs Jewelry	<u>Yes</u>	166.00	 

Note, it will be important, as an approver, you are double checking the status of transactions at the end of the month prior to the period close date to ensure all transactions have been reviewed and approved.

Q. If the approver returns a transaction for information needed, and a delegate is assigned for that cardholder, does the delegate receive the notification the transaction was returned or just the cardholder?

A. The assigned delegate will receive an email notification informing them a transaction has been returned and is requiring information. The cardholder will not receive this notification.

Q. Can we trust if a cardholder makes a purchase it will show on the approver's list of transactions needing approval?

A. No, a cardholder has to submit the transaction to the approver before it becomes viewable to the approver.

Q. I am the primary approver for a set of cardholders. Can I add a secondary approver?

A. If you add a secondary approver they will have access to view/update/approve all cardholders you are assigned to as an approver. Essentially you are assigning a delegate approver to yourself.

Q. Once the statement period is closed can an approver still see the cardholder's past transactions?

A. If the transactions were submitted to the approver the approver can see them up to a year in the past. If the transactions were not submitted to the approver the approver won't be able to them.

Q. Does each transaction need to be approved separately?

A. An approver will have to view each cardholder separately. Then for each cardholder there are multiple approval options:

Option 1: Select each individual transaction and approve within the transaction approval view

Option 2: Select the box next to each transaction you want to approve and select the Approve Selected Items option

[Approve Selected Items](#) [Approve All](#)

2) Select the Approve Selected Items option

Amount Allocation

20.70 [View](#)  

14.38 [View](#)  

38.60 [View](#)  

1) Select the transactions you want to approve by selecting the gray box to the right of the transaction.

Option 3: Select Approve All, this will approve all the transactions listed, selecting each transaction is not needed.

[Approve Selected Items](#) [Approve All](#)

Amount Allocation

20.70 [View](#)  

14.38 [View](#)  

38.60 [View](#)  

Note, it is still a requirement to review all transactions including the attached receipts to ensure completion and accuracy.

Q. Is there a report an approver can run that will provide transactional detail including the FOAPAL and description for their cardholders?

A. No, at this time there is no such report at the Approver level. PNC has indicated they have brought this topic up with management who in turn brought the topic up with Visa. It's a limitation of the system and they've made Visa aware that it is something that many customers want.