

P Card Policies:



Approvers:

1. All areas need to have a **local approver** to have a local set of eyes on area spending and for accountability purposes.
2. When hiring new staff or offering a P Card to a volunteer, the area director (or supervisor) may be the approver to oversee spending and for training purposes.
3. In the absence of a local approver, the acting ARD will be the approver in order to hold the area accountable to be seeking a local approver. If an ARD for the area isn't available, the regional admin will be the approver until a local approver is found or until an ARD is appointed.

Card Limits:

1. Card limits are based on area budgets and role within the area. If you have questions, contact the regional office.
2. Only the regional office may approve of the cash option. Regional P-Cards will that have a cash option will be corrected.
3. Cards are reloaded every other Friday at midnight. So, a \$2000 card limit is actually \$4000 per month.

Card Limit Increases:

1. Increase requests must be made via the online Concur form, saved and link emailed to the regional office.
2. Increases are valid for 30 days, or the end of each month, whichever comes first. (unless you specify another time frame)
3. You will need the following information to make the request:
 - Your current card limit: (call number on back of your card to obtain that info)
 - Amount of needed increase
 - Purpose for increase (i.e. airline tickets, banquet expenses, bus payment, etc.)

Missing Receipt Policy:

We understand that from time to time, you may misplace or lose a receipt. When a receipt is lost or otherwise unavailable and all measures to obtain a copy have been exhausted, the *Missing Receipt Affidavit* should be completed. **This should not become a habit or routine practice.**

1. Cardholders, who submit 5 or more missing receipt affidavits within a trimester report period (Fall/Spring/Summer), may have their P Card suspended.
2. Direct supervisors will be notified and asked to lead additional training on Concur mobile apps along with other receipt best practices.
3. Cardholders who continue to routinely submit missing receipt affidavits will lose P Card privileges. Out-of-pocket expenses should be submitted via Concur and will require a receipt to be reimbursed.

Important P Card & Receipt Policies:

1. P Cards may NOT be used for personal expenses.
 - Be sure to review and update the card on file for online purchases such as Amazon or iTunes.
 - Place a sticker on your P Card for easy recognition and so it's not confused with your personal card.
2. Receipts must be legible and should provide:
 - business name
 - date
 - amount purchased
 - details of what was purchased (not just a purchase amount)

For example, restaurants typically provide three receipts: Merchant copy, Customer copy, and detailed copy. Cardholders should submit both the detailed and customer copy receipts. Request an itemized receipt, if necessary.

Best Practices:

1. Avoid Acronyms: Approvers and outside audit representatives are unfamiliar with Young Life acronyms so avoid using them when reporting business purposes for an expense in Concur.
2. Plan ahead for camp trips and ensure all volunteer leaders have updated HR screenings. Any volunteer needing a P Card must complete the following:
 - HR Screening (Criminal Background and Faith & Conduct)
 - Financial Principles Training
 - Complete and return an online Concur User Form to the regional office