

Office of Post-Award Grants

Completing the Grants Purchasing Card Documentation Form



Purchasing Card Documentation Form

(Complete all areas in yellow)

Please e-mail document in original Excel Format (DO NOT convert to a pdf)

Vendor: [Yellow box]

Your Name: [Yellow box]

Purchasing Card Number (Last 4 digits): [Yellow box]

Transaction Date: 06/03/19 [Yellow box]

Banner Index: [Yellow box]

Amount: \$ _____ - [Yellow box]

Amount populates from the Purchase Listing tab, If used, otherwise you can manually type in amount.

If more than one index is required:

Banner Index: [Yellow box]

Amount: [Yellow box]

Budget category to be charged: [Yellow box]

Not applicable to Faculty-Student Research, AAUP University Research, Faculty Development, and Summer Curriculum Grants.

Description of Purchase: See Attached Purchase Listing

[Yellow box]

Justification: [Purpose]

[Yellow box]

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Filling out the Form

The **Purchasing Card Documentation Form** should be completely filled out.

Please use only **ONE FORM PER VENDER.**

- **Vendor** – Indicate the name of the vendor that you plan to purchase the item(s) from.
- **P.I.'s Name** – Your name.
- **Purchasing Card Number (Last 4 digits)** – This is the last four digit of your card number.
- **Transaction date** – The date you plan to place the order.
- **Banner Index** – The 6 digit alpha-numeric number assigned to your grant.
 - If using more than one index, complete the next section on the form “If more than one banner index is required” and indicate the other banner index(es).
- **Amount** – The total amount of the order.
- **Budget Category** – The line of the budget you would like this expense charged to (i.e. Supplies, Travel, etc...)
 - If you have an AAUP University Research, Faculty Development, or Curriculum Development Grant, or a Faculty-Student Research Grant you would enter “n/a” in this area.
- **Description of Purchase** – List the items being purchased.
- **Justification** – Please explain what the items being purchased are used for, this is used for audit purposes, do not reiterate what is in the Items description box.

Submitting the Purchasing Card Documentation Form for Approval

- Once the Purchasing Card Documentation Form is complete, save to your computer.
- Forward the Excel spreadsheet via email as an attachment.
 - It should be emailed to Kathy Moore at moorek@ccsu.edu for approval **PRIOR** to placing any orders.