**Receipt Scanning**

Receipts need to be scanned into the Box folder for your department in the designated folder for each cardholder. The preferred format is .pdf but .jpg will work as well.

**Before scanning receipts, please check and/or include the following:**

1) Index number (and account code if known) to charge
2) Short description of what it is for (i.e. office supplies; event name)
3) TA number if Travel related and purpose of travel (i.e. Name of Conference, destination city, state)
4) Signature of cardholder
   a. Optional: Signature of person making the purchase - *Delegated User Signature, general Pcard only*
5) No sales tax is charged in the state of Utah (*Hotels are exempt from this*)
6) Tip is 18% or less on dining purchases

Before scanning receipt, combine receipt with supporting documentation, this information may also be added by the cardholder in Service Now receipt processing, otherwise (1 Scan) and check the following:

1) M&E paper form is optional with the receipt scan, this information can be added in Service Now in the receipt processing, by the cardholder.
   a. Date of Event – Location of event (*city, State; if at USU Building & Room #)*
   b. Middle Section: (Name(s) or “see attached list;” indicate affiliation; USU Student, USU Staff, Visitor, etc.)
   c. Purchaser information in the top section of the form (*not in service Now*)
   d. Card holder Signature at bottom left of form
   e. Supervisor – one level up on bottom right of form (*these signatures are indicated in Service Now by approval of the transaction*)
      Note: if a director participates in event with food, the Assoc. VP must sign bottom right of form. (For Service Now processing this will be obtained via email to the appropriate one up and attached by business services level 200)
2) If this is associated with a meeting/training, include the Agenda for the meeting/training.
3) If purchase is a gift or award, Gift/Award form must be completed by Department Liaison in the Gifts Excel form in Box provided by the Controller’s office.
   Note: *Keep a record of all Gift/Award purchases in your office: (date, who received gift and date applied to spreadsheet provided by Controllers and if M&E Form is used reference “list is maintained in office”).*