I. Procedure Statement

The UW-Madison Purchasing Card Program is designed to expedite the purchasing process and reduce the costs associated with processing low-dollar, best-judgment purchases. The site manager is the individual responsible for managing purchasing cards at the departmental or divisional level. This procedure provides specific instructions on how to become a site manager.

II. Who is Affected by This Procedure

Site managers; department chairs; Divisional Business Office staff; Division of Business Services, Accounting Services staff; the Division of Business Services Purchasing Card Program Manager

III. Procedure

A. The department’s administrative staff and the respective Divisional Business Office identify:
   1. An employee who will be assigned the site manager responsibilities.
   2. The cardholders the site manager will support.

B. The identified site manager completes the Purchasing Card Site Manager Form and routes it to the department chair and Divisional Business Office for signatures.

C. Once all signatures have been received, the Divisional Business Office routes the form to the Purchasing Card Program Manager.

D. The identified site manager registers for and attends required purchasing card training sessions.
E. The Purchasing Card Program Manager creates a profile, including assigned cardholders, for the new site manager in U.S. Bank’s web-based transaction management tool, Access Online, and adds the individual to the Site Manager Email Distribution List.

F. The Purchasing Card Program Manager emails Access Online login information to the site manager.

IV. Contact Roles and Responsibilities

A. **Departmental staff.Divisional Business Office staff:** responsible for identification and approval of the site manager.

B. **Purchasing Card Program Manager:** responsible for setting up the site manager’s profile, ensuring the site manager is trained, and communicating login information.

C. **Site manager:** responsible for submitting the Purchasing Card Site Manager Form, attending required purchasing card training, reviewing all card activity, acting as the liaison between cardholders and the Purchasing Card Program Office, and retaining all purchasing card documentation for the required timeframe (six years plus the current year).

V. Definitions

A. **Access Online:** the web-based transaction management tool used to support the Purchasing Card Program at UW-Madison.

B. **Site manager:** the individual responsible for managing purchasing cards at the departmental or divisional level.

VI. Related References

- Purchasing Card Site Manager Form
- Purchasing Card Training Registration
- Access Online

VII. Revisions

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