

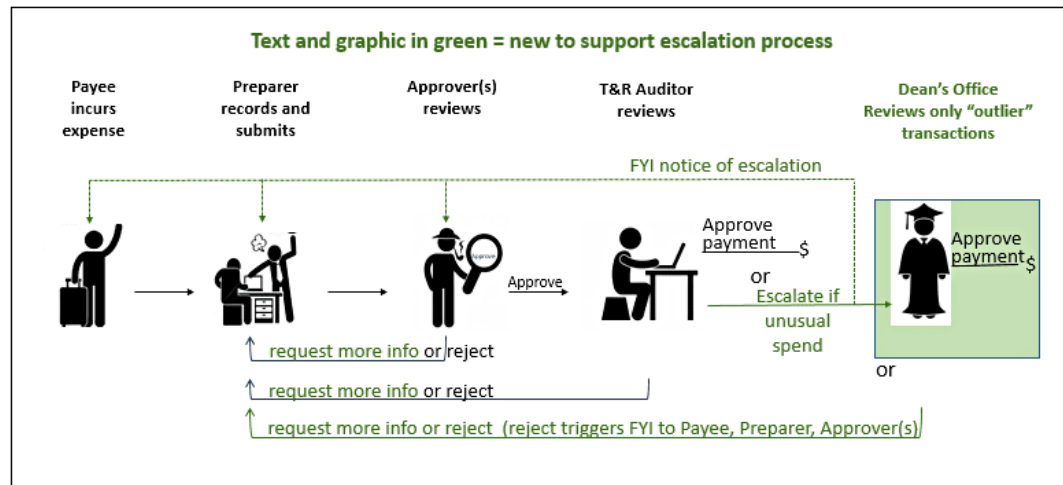
PCard Verifiers – Rollout February 29, 2016

Page or scroll through, or choose what you would like to learn about below.

1. New Escalation Process

On February 29, 2016, Stanford rolled out a new escalation process for the approval of business expense transactions, including both Expense Requests and PCard transactions. The purpose of the new process is to allow the business unit (Dean’s office or department financial management) to have visibility into and final approval of unusually high-cost business expenses.

Dean’s office reviewers (called “escalation designee”) have been identified by Stanford business units and assigned escalation approval authority. Escalation to the designee will **only** occur if a transaction has unusually high cost and has already been approved by all approvers in the standard approval workflow. The Travel and Reimbursement department (T&R) will escalate a transaction to the designee for final review and approval.



2. FYI Notifications about Transaction Escalation

When a transaction is escalated for Dean-level approval, the verifier, and all approvers on the approval routing list are notified.

[FYI Notifications about Transaction Escalation](#)

3. New Fields for PCard Verification – Expense Type and Number of Attendees

The PCard module has been enhanced to provide warnings to approvers when meal costs exceed per person guidelines. This capability is enabled by two new fields in the PCard verification system. See below:

[New Fields for PCard Verification – Expense Type and Number of Attendees](#)

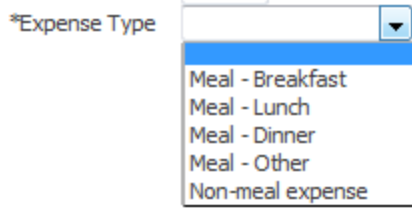
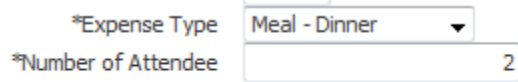
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FYI Notifications about Transaction Escalation

Item	Description	System												
FYI Notifications about Transaction Escalation for Dean-level Approval	<p>You will be notified when a transaction for which you are the verifier is escalated.</p> <p>The notification is purely FYI – there is no further action required by you.</p> <p>You will also be notified if an escalated transaction is approved or rejected.</p>	<p>PCard Transaction Compliance Review for transaction 2809701 (FYI only)</p> <p>From: PCard Auditor To: [Redacted] Sent: 20-Feb-2016 10:41:19 ID: 122953316</p> <p><u>2809701</u></p> <p>Compliance Reviewer : PCard Auditor</p> <table><thead><tr><th>Compliance Reason</th><th>Compliance Description</th><th>Auditor's Remarks</th></tr></thead><tbody><tr><td>Escalation</td><td>Needs approval from designee</td><td></td></tr></tbody></table> <p>Return to Worklist</p> <p>PCARD Transaction 2809454 has been Rejected</p> <p>From: PCard Auditor To: [Redacted] Sent: 20-Feb-2016 10:30:33 Closed: 20-Feb-2016 10:30:33 ID: 122953315</p> <p><u>2809454</u></p> <p>Compliance Reviewer : PCard Auditor</p> <table><thead><tr><th>Compliance Reason</th><th>Compliance Description</th><th>Auditor's Remarks</th></tr></thead><tbody><tr><td>Escalation</td><td>Needs approval from designee</td><td></td></tr></tbody></table> <p>Return to Worklist</p>	Compliance Reason	Compliance Description	Auditor's Remarks	Escalation	Needs approval from designee		Compliance Reason	Compliance Description	Auditor's Remarks	Escalation	Needs approval from designee	
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New Fields for PCard Verification – Expense Type and Number of Attendees

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New Fields for PCard Verification – Expense Type and Number of Attendees	<p>Two new fields have been added to the “Verify PCard Transactions” screen.</p> <ul style="list-style-type: none"> • Expense Type • Number of Attendees <p>PCard verifiers must select an Expense Type from a dropdown list that includes these options:</p> <ul style="list-style-type: none"> ○ Meal – Breakfast ○ Meal – Lunch ○ Meal – Dinner ○ Meal – Other ○ Non-meal expense <p>If a meal expense, select the type of meal. For all other types of expenses, select “Non-meal expense”.</p> <p>When one of the meal expense types is chosen, a second field appears and verifiers will enter the number of people in attendance at the meal.</p> <p>Important Note: Verifiers should make sure that for business meal expenses, attendee names and their Stanford affiliation is clearly stated in the Business Purpose and documented in an attachment if necessary.</p>	<div style="text-align: center;">  </div> <div style="text-align: center; margin-top: 20px;">  </div> <div style="text-align: center; margin-top: 20px;"> <p>Meals Guidelines</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Meals</th> <th>Suggested Amount per Person (including tax, tip and alcohol)</th> </tr> </thead> <tbody> <tr> <td>Breakfast</td> <td>\$12 - 20</td> </tr> <tr> <td>Lunch</td> <td>\$18 - 35</td> </tr> <tr> <td>Dinner</td> <td>\$36 - 80</td> </tr> </tbody> </table> </div>	Meals	Suggested Amount per Person (including tax, tip and alcohol)	Breakfast	\$12 - 20	Lunch	\$18 - 35	Dinner	\$36 - 80
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