



## Purchasing Card – How to Become a Purchasing Card Site Manager

Procedure # 3013.4; Rev. 0 (Effective May 8, 2017)

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**Related Policy:** [UW-3013 Purchasing Card Policy](#)

**Functional Owner:** Accounting Services, Division of Business Services

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### I. Procedure statement

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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

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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

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- 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 Department ID range the site manager will support.
- B. The identified site manager completes the [Purchasing Card Site Manager Agreement](#) and routes it to the department chair for approval.
- C. The department chair reviews and approves the [Purchasing Card Site Manager Agreement](#) and routes it to the Divisional Business Office for approval.
- D. The Divisional Business Office reviews and approves the Purchasing Card Site Manager Agreement, updates the Purchasing Card Approver Assignment Grid, and routes the agreement and grid to the Purchasing Card Program Manager for processing.

NOTE: To obtain a copy of the current Purchasing Card Approver Assignment Grid, contact the Purchasing Program Manager.

- E. The identified site manager registers for and attends required [purchasing card training](#) sessions. The Purchasing Card Program Manager verifies training completion, assigns the new site manager to the requested Department ID range in the Purchasing Card Module of the Shared Financial System, and adds the individual to the Site Manager Email Distribution List.
- F. The Purchasing Card Program Manager emails confirmation to the new site manager.

#### IV. Contact Roles and Responsibilities

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- **Departmental staff/Divisional Business Office staff:** responsible for identification and approval of the site manager.
- **Purchasing Card Program Manager:** responsible for ensuring the site manager is trained and assigning the site manager role.
- **Site manager:** responsible for submitting the Purchasing Card Site Manager Form, attending required purchasing card training, reviewing all card activity, and acting as the liaison between cardholders and the Purchasing Card Program Office.

#### V. Definitions

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- **Purchasing Card Program Module:** Module of the Shared Financial System (SFS) used to reconcile purchasing card transactions; also, the system of record for all purchasing card supporting documentation and reconciliation approvals.
- **Site manager:** the individual who manages purchasing cards at the departmental or divisional level.

#### VI. Related references

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- [UW-3013 Purchasing Card Policy](#)
- [Procedure 3013.2: Purchasing Card Use and Account Management](#)
- [Purchasing Card Site Manager Agreement](#)
- [Purchasing Card Training Registration](#)

#### VII. Revisions

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Procedure Number	3013.4
Date Approved	May 8, 2017
Revision Dates	Jan. 19, 2021 - Updated Procedure Number to 3014.1 from 300.4 December 11, 2021 – Purchasing Card Module implementation