Documentation

Methods of Making A Purchase

Purchases may be over the counter, via fax, via telephone, or via Internet. Such documentation will be used to verify the purchases listed on the Cardholder’s monthly Memo Statement of account.

Documentation

A receipt, documentation or Missing Receipt Form MUST support each purchase made on the Purchasing Card. Supporting documentation should also include receipt information.

- An original receipt from the merchant should include:
  1. Merchant Name
  2. Transaction Amount
  3. Date
  4. Itemized description of item(s) purchased
- Copies or facsimiles of the original receipt.
- A packing slip or other documentation received from the merchant.
- A screen-print or order confirmation email, when making Internet purchases, or a copy of an order-form that was sent to a merchant to request an item.

If a Cardholder is unable to obtain a receipt, a completed Missing Receipt Form must be attached to the Cardholder's Memo Statement verifying that the purchase was made for university business. For more details, please refer to Missing Receipt.

Purchase Over the Counter

- The Cardholder shall retain the invoice and customer copy of the charge receipt.
- The Cardholder is responsible for checking that the supplier lists the quantity, fully describes the item(s), and
excludes sales tax before signing the charge slip.

- The Cardholder shall make note of all the needed information to complete the Transaction Notes section of the Baylor Transaction Detail report.

## Purchase By Phone

- The Cardholder shall make note of the individual's name taking the order.
- The Cardholder shall retain all shipping documentation.
- The Cardholder shall make note of all the needed information to complete the Transaction Notes section of the Baylor Transaction Detail report.

## Purchases for Technology Procurement

Various technology purchases must have written approval from the Academic Dean (academic departments) or Vice President, or their designated representative (administrative departments) before purchases can be made. For audit purposes, written approval must be attached to the monthly Purchasing Card documentation. Please refer to [https://www.baylor.edu/techprocurement/](https://www.baylor.edu/techprocurement/) for complete Technology Procurement policy guidelines.

## Length of Retention

Documentation of purchases made with the Purchasing Card should be retained by the Cardholder making such purchases for a period of the current fiscal year plus the six previous fiscal years.