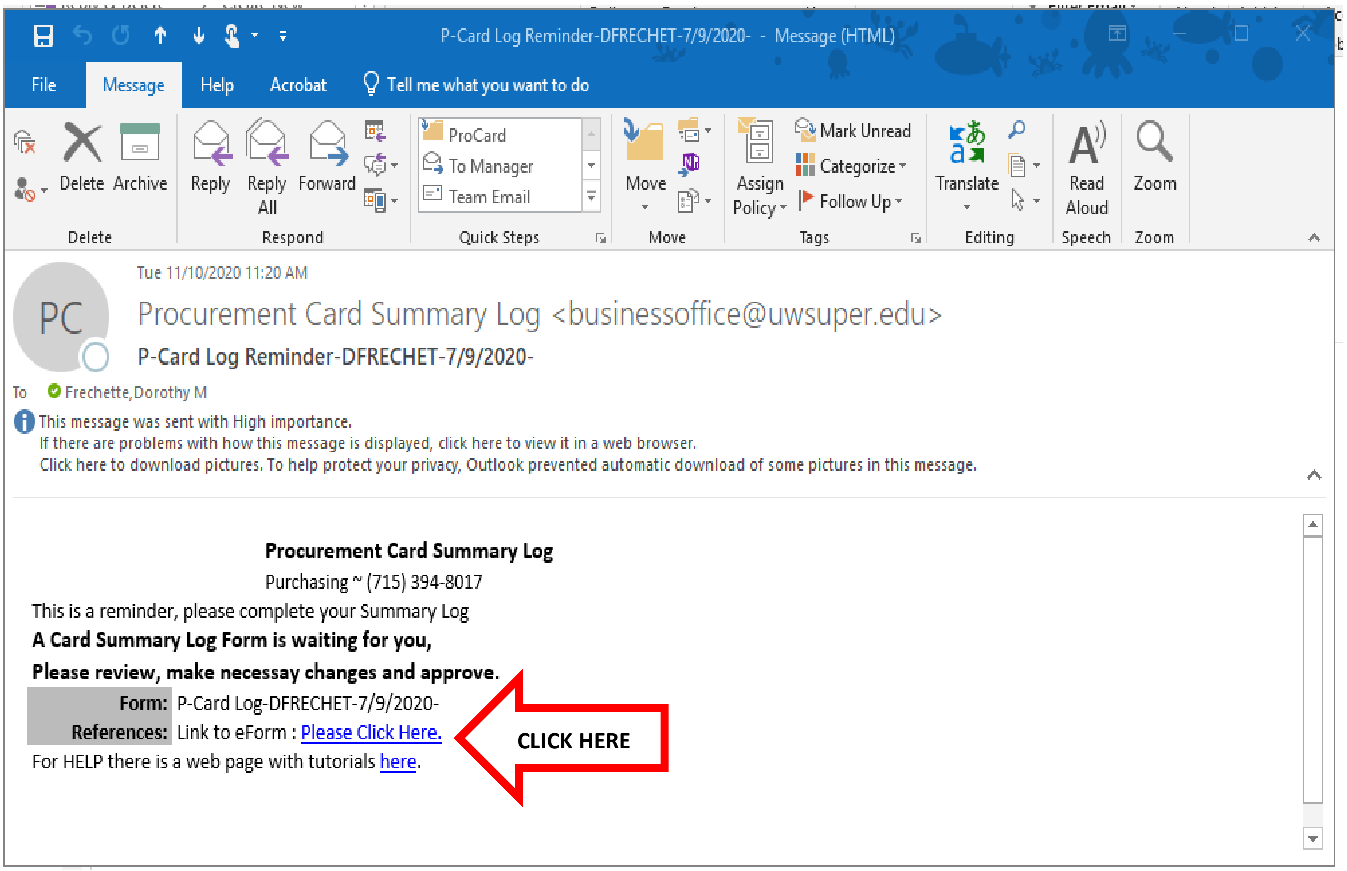
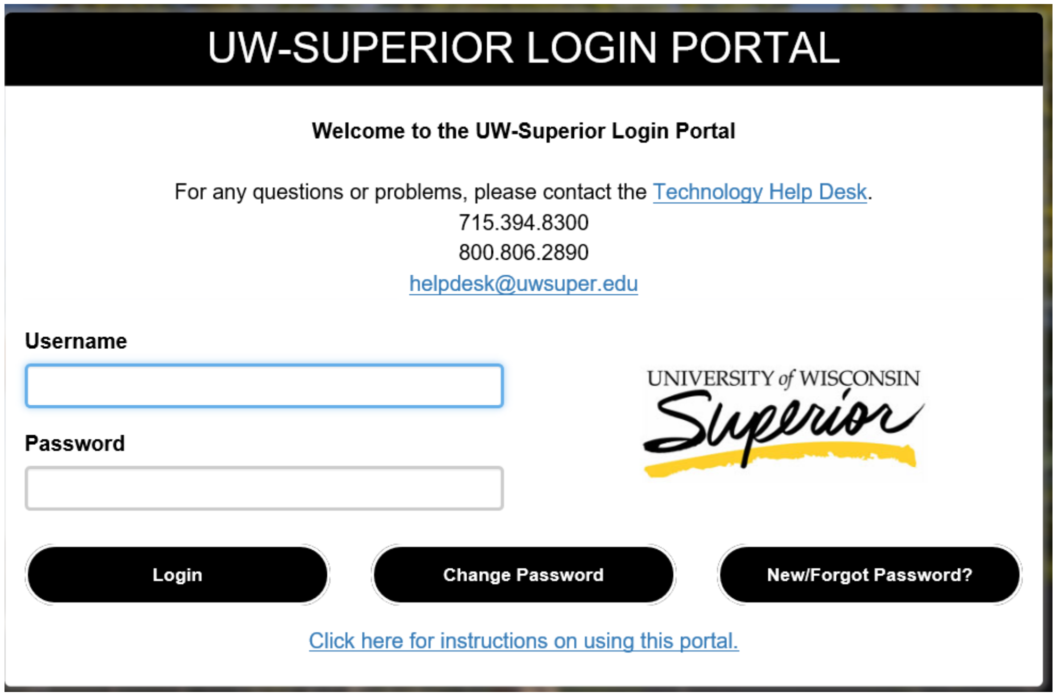
SUBMITTING ELECTRONIC PRO-CARD STATEMENT IN BP LOGIX

1. Cardholder will receive an email notification that there is a statement waiting to be completed:



2. To access the statement the cardholder can click on "Please Click Here" to open in Internet Explorer or they can right click on "Please Click Here" to choose which browser the statement opens in.

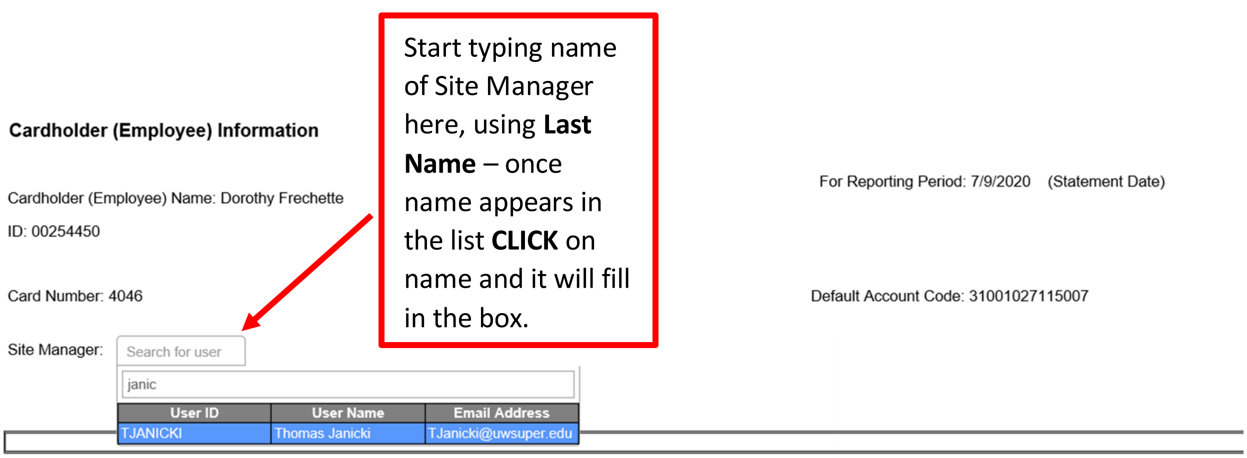
   The system will bring you to the UW-SUPERIOR LOGIN PORTAL – login using your UW Superior username and password.



Once logged in the statement will open to complete – all information on the form must be completed.

3. Complete the Procurement Card (Pro-Card) Statement with all the information as noted:

    a. Select Site Manager ***(required field)*:**



b. Enter Business Purpose for each purchase charged to the Pro-Card ***required field)*:**


1. Vendor: FERGUSON ENT #1675 Items Purchased on 6/16/2020 : Cost: $47.92

Purpose or Business Case: State your Business Case

Accounting Code - Segment Name (Length)

ACCOUNT(4)	FUND(3)	DEPARTMENT(6)	PROGRAM(1)	PROJECT/GRANT(7)

Enter Purpose or Business Case here – if the expense is a registration fee please be sure to attach an agenda/schedule at a glance for the event and the event registration form.

OPTIONAL: **Enter the Accounting Code/Cost Center <u>IF</u>** the expense needs to be reallocated to another funding source/cost center. If not, leave blank.

****OPTIONAL** (box above) – only enter this information **<u>IF</u>** the expense needs to be moved from current cost center/account code to a new cost center/account code. If it does not need to be reallocated, you can leave blank.

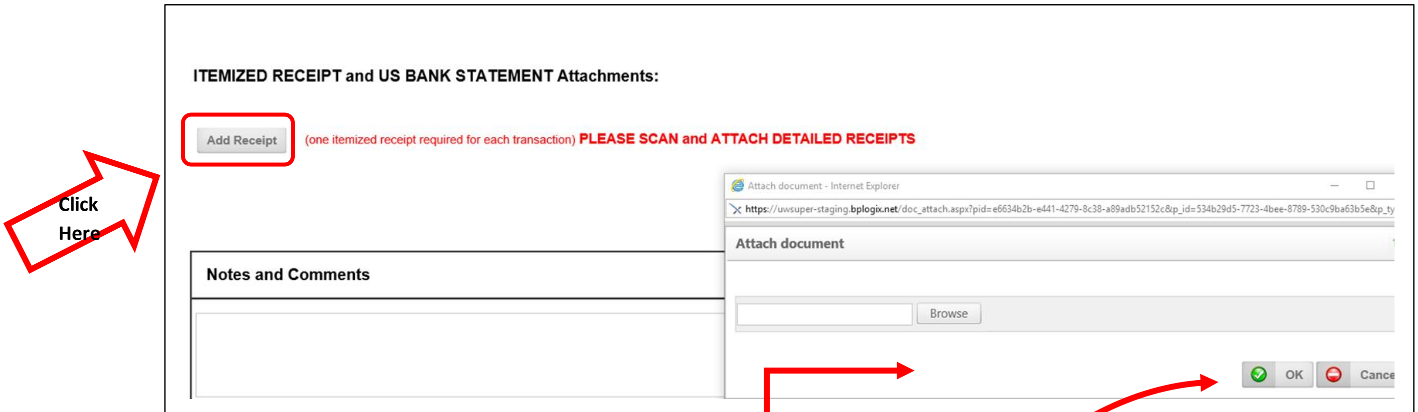
c. Add Attachment – *A RECEIPT ATTACHMENT IS REQUIRED FOR EACH PRO-CARD ITEM LISTED*.

Also attach any additional documentation that may be needed to substantiate the purchase as in an agenda for conference registrations, approvals for certain purchases, etc.

The allowable forms of documentation/attachments are JPEG, PDF or Excel. If you have a word document, please save as a PDF before attaching to the statement.

Label attachments to match the purchases on the statement. Example: Menards purchase on 11/20/2020, the receipt attachment should be named - Menards – 11/20/2002 or similar.

DO NOT use a URL or website link as an attachment for documentation. If a URL/website is attached, the statement will be sent back to have the information attached in an acceptable format.

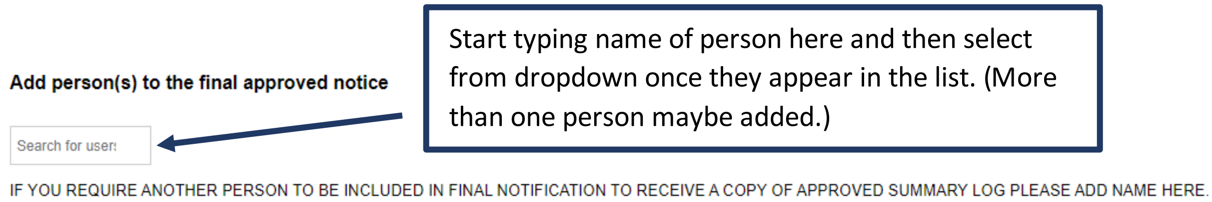


This Attach Document will Pop Up:

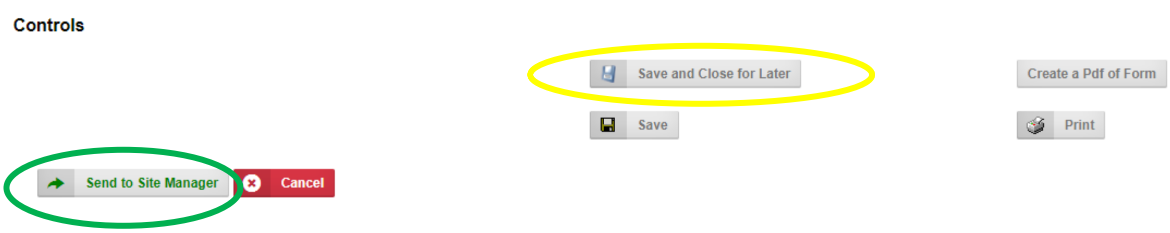
Click Browse – find your attachments (you can select more than one at a time by holding down the Shift Key and Clicking on your attachments) or keep clicking browse until all Attachments have been attached

Once all Attachments are selected **Click OK**

d. **OPTIONAL**: If the Cardholder would like an alternate to receive a copy of the final Pro-Card statement (after audit approval) enter the name here.



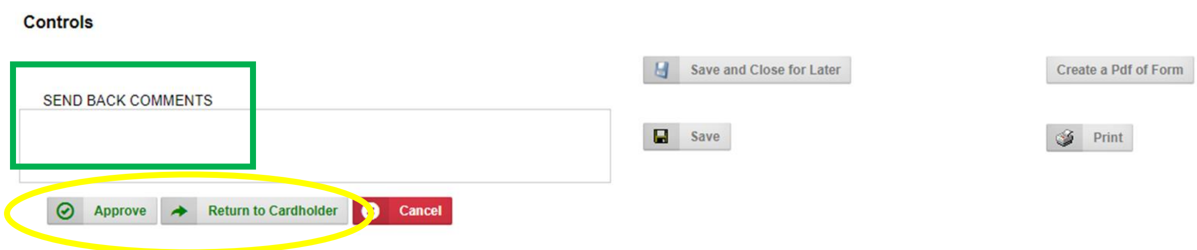
e. If the Cardholder cannot submit the form right away, the Cardholder may also "Save and Close for Later" to save the information that was entered until they are ready to submit.



f. When the form is complete, click "Send to Site Manager" to submit the form to the Site Manager to review for validity and to approve.

The Site Manager will receive an email that looks just like the email above notifying them they have a Pro-Card statement to approve. The Site Manager should click on the "Please Click Here" link in the email to review the statement for validity of purchases.

The items the Site Manager should be verifying are if the business purpose is noted, all attachments are valid, etc., to ensure the expense is an appropriate expenditure.
The Site Manager can either "Return to the Cardholder" for more information or "Approve" the statement.



If the Site Manager is Returning to the Cardholder, the Site Manager is required to enter the reason in the "SEND BACK COMMENTS" box. The system will not allow the statement to be sent back to the cardholder without this information.

Once approved by the Site Manager the form will be routed to the Business Office for auditing.

Accessing BP Logix without an email

BP Logix can be accessed when no email is available in two different areas:

*A button on the Business Services website

*A link in Technology Services – Campus Logins

If a cardholder would like to view their statements within BP Logix, current and past, they will log into BP Logix and click on "Knowledge Views and Reports", then click on "Pro Card Status KV". This section will have all of the statements stored in BP Logix. Cardholders can sort the information by clicking on the Header of the column to sort. Can sort by Submit Date, Amount, etc.

For Questions concerning this process, please contact:

Dawn McMillan at dmcmilla@uwsuper.edu or ext. 8384
Tia Harrison at mharri16@uwsuper.edu or ext. 8226

Note

*Cardholders have **60 days** from the date of receipt to process/submit the pro card statement.

*Per IRS regulations **ALL** paper documentation/receipts should be kept for at least 7 years.