

Policy and Procedure Changes at a Glance

Form 3201 FR.01 *Purchase Requisition and Purchase Requisition Instructions*

We have updated this form to include the role of the Initiator.

Form 3401 FR.02 *Check Request*

We have updated this form to include the role of the Initiator.

Procedure 3215 PR.01 *Yale Purchasing Card (PCard) and Expense Management System (EMS)*

There are several changes that affect many Yale Purchasing Cardholders and Yale Business Units, please carefully review the highlighted sections of the [Procedure 3215 PR.01 Yale Purchasing Card and Expense Management System\(EMS\)](http://www.yale.edu/ppdev/Procedures/purchase/PurchasingCard/3215PR.01PCardEMS.pdf).

<http://www.yale.edu/ppdev/Procedures/purchase/PurchasingCard/3215PR.01PCardEMS.pdf>

What happened to the Employee Reimbursement form and Non-EMS language?

The Employee Reimbursement form and SWAP were de-supported on 6/30/07. As a result, the non-EMS language was removed.

Who do I reimburse through EMS, and who do I reimburse via the Check Request form?

This section of the procedure has been revised to provide the job categories of individuals appropriate for reimbursement through EMS and those appropriate for reimbursement via check request

Are relocation expenses appropriate to charge to a PCard?

NO, due to tax implications, the PCard should not be used to pay for such expenses. All relocation expense reimbursement requests should be submitted using the Relocation Reimbursement Form, [Form 3501 FR.46](#), and submitted to the University Transportation Manager.

What is the difference between Transaction Disputes and Transaction Fraud?

A “transaction dispute” is when a cardholder has made a purchase using their PCard, but believes that they were charged the incorrect amount. “Transaction fraud” is when a cardholder notices a charge on their PCard which they did not authorize and have no knowledge of.