

Procurement Tools Reference Guide

Pcard

Tool	When to Use
1. Purchasing Card or P-Card**	<p>Generally used to pay for low dollar items and for recurring payments with vendors (eg; cell phone bills). Not to be used for travel or entertainment.</p> <p>Can also be used to facilitate the purchase of goods online.</p> <p>This card is reconciled by the cardholder and paid for by Western.</p>
2. P-card with Travel Coordinator Role	<p>Used to pay for travel and accommodations for <u>non-employees at Western</u>. Most commonly used to pay for train tickets and hotel rooms for guest speakers, interview candidates etc.</p> <p>This card is reconciled by the cardholder and paid for by Western.</p>
3. Travel Card	<p>Used to pay for business travel expenses. No personal expenses should be paid for using this card.</p> <p>This card is paid for by the cardholder. A travel and expense claim must be submitted and approved for reimbursement.</p>

****Control features on the Western P-card block purchases from being made on restricted categories (eg; travel and entertainment)**

Mustang Market

Tool	When to Use
1. Catalogues	<p>Use the catalogues to order items from Western’s preferred vendors.</p> <p>Negotiated pricing is reflected in these catalogues. This ensures all Western staff and faculty have access to the same negotiated pricing, on the same items.</p>
2. Order Form (<10K)	Use this form for placing orders of \$10k or less with non-catalogue vendors.
3. Order Form (>10K and Consulting)	Use this form for consulting services of any value or non-catalogue orders over \$10K.
4. Cheque Requisition Form	An electronic version of the paper copy cheque

	requisition form.
5. Invoice Attached Form	This form should only be used on an exception basis. Used to generate a purchase order when the goods and/or services and invoice have already been received.
6. Change Order Request Form	The change order form is used to request specific changes to a purchase order such as cancellation, account change, speed code change and increase/decrease of PO.