Transaction Request
Form Instructions

Card User should only be completed if you are requesting a Pcard. If you are requesting a check, a PO, or a cash reimbursement, complete the Vendor section with complete Vendor name and address.

Select which one is appropriate for your request. Chartwells is always a Purchase Order. For Pcard indicate date you want to pick it up; for check indicate mail or pick-up.

These MUST be signed by President or Treasurer AND Advisor & dated.

Do not sign as card user until you pick up the pcard.

Organization: you should give your full Organization Name. Org code should be your three letter org code.

You must designate an account from your budget from which the expenses will be drawn.

You will write down the cost estimate; use your best guess if you are going to a local store. If you have a quote from a vendor, use that amount. Do not fill in the “adjusted cost”. We will do that after all purchases are complete.

This section is for office notes only

Every transaction MUST have a form PRIOR to purchase

Submission of Transaction Request does NOT guarantee approval!

Rev 08-22-18