Hello SoHE P-Cardholders,

I hope all of you are well! I have a quick update on a couple of p-card-related topics:

1) **Sales Tax Tolerance Level Change**: You may have noticed a policy update in the campus July P-card News update that effective immediately (as of July), the sales tax tolerance level on the p-card has increased from $5 to $25. This means that while it is still necessary to apply the UW’s tax exemption to p-card purchases at the time of purchase, if sales tax is inadvertently paid in an amount of $25 or less, the cardholder is not required to contact the vendor and document the attempt to recoup the tax amount.

Any sales tax amounts charged to the p-card that are greater than $25 will still require a documented attempt by the cardholder to recoup the tax, to be included with the p-card statement.

2) **P-Card Reminder Emails**: Starting with the p-card statement due next week, I will be sending out courtesy reminder emails on Mondays of p-card weeks to all cardholders with purchasing activity during the previous biweekly cycle, as a reminder that they have a statement due the next day, on Tuesdays by 12 pm. This reminder email will refer cardholders to the US Bank AccessOnline site to login, download and complete their statement, entering any funding changes and business purpose information, attach all receipts and supporting documentation, and submit to me via email by the Tuesday deadline. (Note: Statements are typically available on Friday afternoons/evenings prior to the due date. If you have a statement due and provide it to me prior to Monday’s reminder, or did not have any purchasing activity during the cycle, you will not receive a reminder email for that cycle.)

There has been a noticeable uptick in some cardholders regularly submitting statements past SoHE’s p-card week deadline when statements are due (Tuesdays by 12 pm), which causes additional follow-up later in the week to track down statements and creates extra strain in getting all transactions reviewed and reallocated before the campus deadline. The feedback I’ve received is that this is oftentimes due to forgetting that a statement is due. My hope is that by sending these reminder emails out on Mondays, this will help generate more timely compliance with the Tuesday deadline, and eliminate the need for unnecessary follow-up later in the week and non-compliance notices being issued.

Thank you, and stay well,

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