

Procedure for Group Purchase and Distribution of Mobile Phone Credit Cards

1. The Team Leader or his/her delegate makes a list of each person who will get credit, and how much they will get.

Use the ***Phone Card Distribution Sheet Template.xlsx*** to make the list, in columns A – H.

The more time you expect each person to spend on the phone, the more credit you should give them. This sometimes correlates with seniority, but not always. Low level procurement staff are not senior, but you will want them to be on the phone a lot.

2. Copy and paste the information in columns A – H into the ***Phone Card Authorization Memo Template.doc*** and fill in the rest of the memo information.
3. Print the memo and sign it as an approval of the expense.
4. Send someone out to get the cards in the amounts and types listed.
5. Have the custodian of the cards (someone who is in the office all the time and can keep them locked up) print out the ***Phone Card Distribution Sheet Template.xlsx*** with the list of people who get cards. The custodian will keep the cards locked up with this sheet.
6. Each staff person entitled to a card can come to the custodian at any time during the month and get his or her card. When he or she picks up his or her card, s/he will sign and date the spaces in the appropriate row to show that s/he received it.

Next month you can start with the list you already have. Just take out a copy of the old list, make any changes you need to make, and repeat steps 2 through 6.