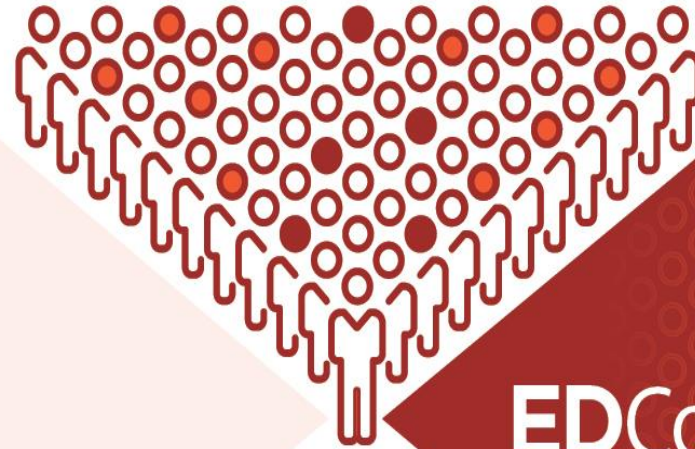




Education



**EDConnect**

# EDConnect

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Customer Experience & Account Management Team

# Who are we?



EDConnect provides a single point of contact for support

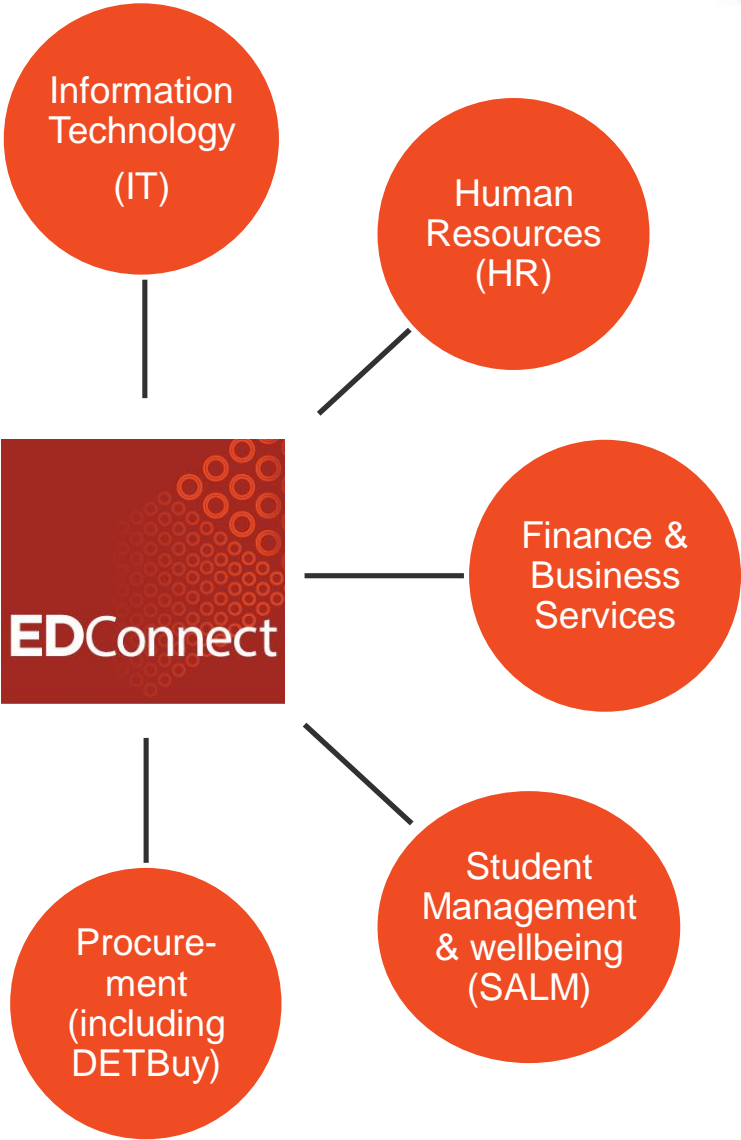


Log an online query

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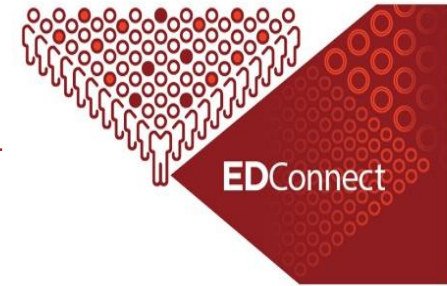
1300 32 32 32

How do I reach  
EDConnect?



# Benefits of using online query

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## Benefits to you



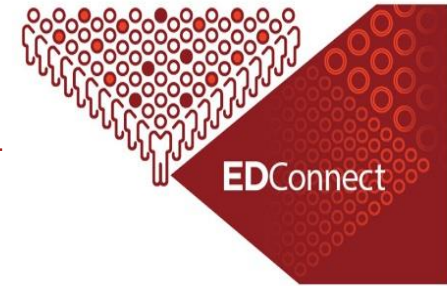
- Convenient option
  - Take your time – if you're interrupted, you can come back to it later
  - Log an online query at any time and we will get back to you during business hours.
- Ask for support at a time that suits you
- Provide all the details of your query and screenshots, so EDConnect can investigate without you waiting on the phone

## What happens behind the scenes?



- You'll get a Remedy incident number to track
- Your query will be assigned to the relevant team to resolve
- The responsible agent will call you if they need more information before managing your issue and resolving the incident

# Customer Satisfaction and Feedback Program



1

Feedback on  
a customer  
query

You may receive an email invitation asking you to rate our service. And there is the opportunity to provide further feedback (suggestion, compliment or complaint).

2

Customer  
feedback at  
anytime

Using the [EDConnect webpage](#) to provide feedback (suggestion, compliment or complaint) at anytime

#### On this page

- > [Contact us](#)
- > [Our services and how to provide feedback](#)
- > [Links to self-help including quick reference guides \(QRG's\)](#)



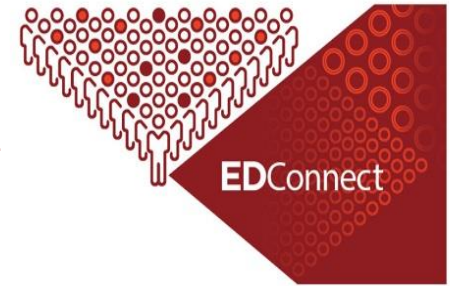
A person's hands are holding a white rectangular sign in front of a blurred background of warm, colorful bokeh lights. The sign features the text "YOUR FEEDBACK MATTERS!" in a bold, dark red, sans-serif font. The text is arranged in three lines: "YOUR" on the top line, "FEEDBACK" on the middle line, and "MATTERS!" on the bottom line. The hands are positioned on the left and right sides of the sign, with fingers gripping the edges. The background consists of out-of-focus light circles in shades of yellow, orange, and green, creating a festive or celebratory atmosphere.

**YOUR  
FEEDBACK  
MATTERS!**



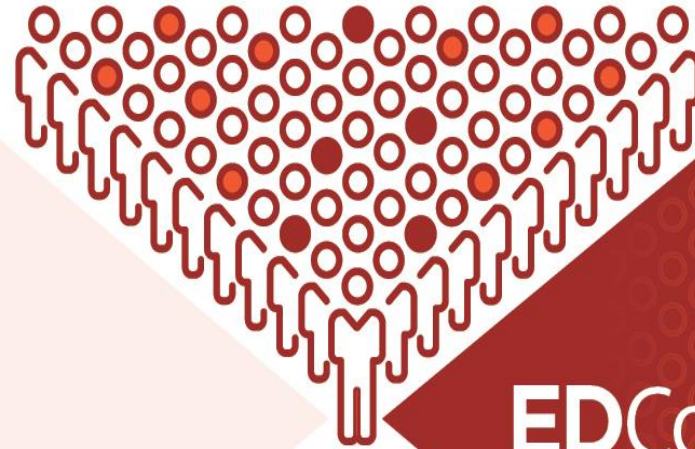
**EDConnect puts the customer at the centre of everything we do!**

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Education



**EDConnect**

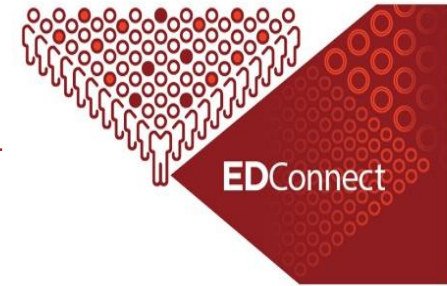
# PURCHASING CARDS

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Graeme Northcote Senior Manager, Business Services, Operations  
Angelique Christey Team Leader Purchasing Cards, Business Services

# What is a Purchasing Card (PCard)?

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PCards ....

- are VISA credit cards issued by Westpac bank
- are a fast and cost effective alternative to purchase orders, petty cash, staff reimbursements, store accounts, cash advances and cheque payments
- eliminate staff being out of pocket due to using their own funds or personal credit cards to pay for business related expenses
- can be used for payments at point of sale, online or by phone
- have the same rules apply as with other payment methods
- are available to staff who make payments as part of their job. Any staff member who makes payments or buys goods and services as part of their role can be issued a PCard



# Applying for a PCard




Applications can be made online in ‘expense8’ which can be accessed via the staff portal

expense8

Daniel

Dashboard

Card Application



Click here to start a new Purchasing Card Application.

Welcome

Welcome to the expense8 Expense Management System (EMS)

From 30 June 2017, expense8 will allow cardholders, Reviewing Officers and Preparers to submit PCard maintenance and change requests from within the expense management system.

A range of QRGs can be viewed at the [PCard Maintenance and Change Request intranet page](#).

Useful links

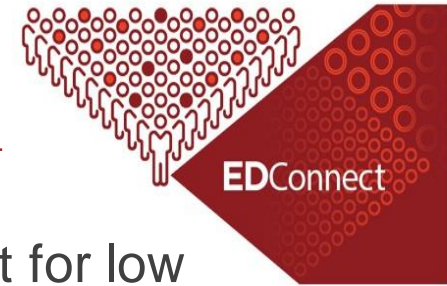
- Training materials such as Quick Reference Guides (QRGs) please click [here](#).
- Purchasing Cards Policy click [here](#)
- Purchasing Cards Guidelines click [here](#)
- Frequently asked Questions click [here](#)
- Using Purchasing Cards – A Guide for Schools click [here](#)
- [Privacy Notice](#)

**Lost Cards:** If you have lost your card please contact Westpac immediately for action to be taken to prevent unauthorised use of the card on 1300 651 089.

For additional support contact EDConnect - 1300 32 32 32.

# What can PCards be used for?

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- Schools should consider PCards as a primary method of payment for low value goods and services. Ask “can I use my PCard to make this payment”, and if not, then pursue other purchasing methods
- PCards are not just for school executive staff and not just for emergency purchases
- PCards can be used for approximately 80% of the purchases made by schools
- Around 30% of all schools invoices are valued at less than \$100. This provides an opportunity to improve the efficiency of the payment process
- PCards can be used for purchasing goods and services online, via the phone or in-store, *without a purchase order*

# What can PCards be used for?

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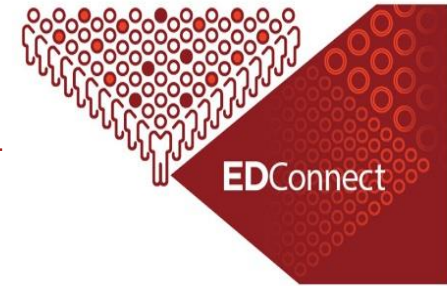


Types of purchases PCards can be used for:

- Stationery
- Excursions
- Library and text books
- Teaching resources
- Catering for official functions
- Travel
- iTunes apps
- Payment of monthly store accounts, e.g. Bunnings
- Small equipment
- Hardware and tools
- Landscape supplies
- Fuel for the lawn mower, trimmer etc
- Trades – where school funds are being used

# PCard roles

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There are three roles for using PCards:

## 1. Cardholder

- Cardholders must acquit their own transactions in 'expense8'

## 2. Preparer

- A Preparer can pre-enter transaction information and upload invoices on behalf of a cardholder in readiness for them to check and acquit

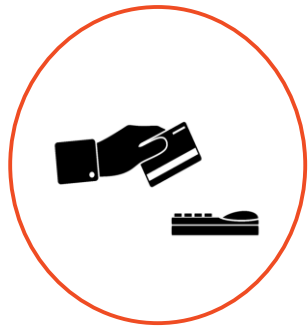
## 3. Reviewing Officer

- The reviewing officer, reviews transactions and approves or does not approve

# How does the PCard process work



**Step 1:**  
Make  
purchase



**Step 2:**  
Retain invoice  
or receipt



**Step 3:**  
Scan invoice  
or receipt  
to *expense8*



**Step 4:**  
Action the  
workflow email  
to acquit



**Step 5:**  
Approval by  
reviewing  
officer




*You can scan from  
mobile device or office  
machine*



# How does the PCard process work- Acquittal



EDConnect

 Westpac Visa [COLES 4505](#) 30/10/2017 - October 2017

\$84.97

Expense Type

Cost Centre

Cost Centre

Search for code

Purpose

Enter text

Fund Code

Search for code

GL Account

Search for code

**Example**

**Preferred Description**

Lunch

Lunch - travel to Bathurst to attend training

Stationery

Stationery for course participants at training  
20/09/2016

Dry  
cleaning

Dry cleaning student band uniforms

Prizes

Student prizes for school awards ceremony

Books

Books and resources for school library

# Transaction and monthly limits

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## Transaction limit

- The transaction limit is the maximum you can spend in a single transaction
- Transaction limits are restricted to a maximum of \$1,000 for Teachers, SAOs, SLSO, General Assistants and Farm Assistants
- You cannot split a purchase to stay under your transaction limit

## Monthly limit

- The monthly limit is the total amount a cardholder is able to spend during the month
- The monthly limit should be decided in consultation with the Principal
- Monthly limits are reset on the 2<sup>nd</sup> or 3<sup>rd</sup> day of each month

# Additional information on PCards



NSW DEPARTMENT OF EDUCATION

Business services

STAFF ONLY

Enter your search...



[Business services](#) > Purchasing cards

## Purchasing cards

Purchasing card applications, guidelines, QRGs and training resources.

- > [Applying for a Purchasing Card \(PCard\)](#)
- > [PCard Policy and Guidelines](#)
- > [Help and support](#)
- > [News and updates](#)
- > [PCard Maintenance & Change Requests](#)
- > [Training](#)
- > [Frequently asked questions](#)

