

Quick Guide: PEX Cards



Your PEX card is a prepaid debit card. It's a convenient way to make purchases and cover periodic expenses using the money in your CultureTrust account. You request how much money to load onto the card, and then report your spending each month. Our staff reviews requests and reports to ensure clear and accurate financial reporting.

HOW TO USE

1. Request a PEX card by filling out the *PEX Card Initial Request Form* (available on our website) and then submitting the completed form in SAGE. A physical card will be mailed to the address you provide.
2. Use the card for in-person or online purchases wherever credit cards are accepted.
3. By the 15th of each month, submit a PEX expense reconciliation in SAGE, and include receipts for all purchases.
4. Request to load more money onto the card by submitting the *PEX Card Refill Form* through SAGE. Funds will be available in 4 business days.*

*Rush processing is available for a \$50 service fee.

Visit our website for forms and detailed SAGE tutorials:
cultureworkspbila.org/for-members

REMEMBER: PEX is for products, not people!



YES

Advertising
Business meetings
Equipment (small)
Internet & phone
Materials & supplies
Membership dues
Merchandise
Permits & visas
Postage & shipping
Printing
Software
Subscriptions
Transportation
Travel & hotel



NO

Staff
Consultants
Contractors
Equipment (large)
Leases

ANYTHING requiring a signed contract

TIP: For a full list of eligible expenses, look at the chart of accounts listed in the *How to Reconcile PEX Card Statements* tutorial. Contact our staff with any questions.