PRO-U5348.04B USING A PCARD WITHIN THE PURCHASING DEPARTMENT

Applies to any Buyer who elects to use a Buyer’s PCard to fulfill a Purchase Form which has been received from a campus department. Usage of this nature will generally occur when the requesting department has not yet elected to participate in the PCard program, when the transaction cost exceeds the level for purchases by departments, or when the item is restricted.

Definition:

Departmental Purchase Limit: Maximum dollar amount that departments may purchase without involving Purchasing. The dollar limit is determined prior to sales tax and shipping costs.

Action by: Action:

Department 1. Prepares and submits Purchase Form for Purchasing to complete order.

Purchasing Assistant 2. Enters incoming Purchasing Form into Banner (FWIPURRR) for tracking purposes.

Buyer 3. Determines transaction is appropriate for PCard use.

4. Places order with PCard (online, phone, fax, mail, or in person).

5. Prints online order screen, photocopies mail-in order form, or asks vendor for a confirmation.

6. Notes a confirmation has been requested on the Purchasing Form.

7. Stamps white and yellow copies of the Purchasing Form with, “This order has been placed on PCard by Purchasing.”
Action by: 

Action:

8. Sends e-mail notification on the day the purchase is made to the requesting department to advise that the purchase was made on a PCard.

Note: If the departmental purchasing limit is exceeded, a positive confirmation is also required from the requesting department that goods have been received.

9. Retains documents until the PaymentNet review is completed, and until a confirmation is received if required.

10. Conducts transaction review as per TSK-U5348.04A, Reviewing PCard Transactions.

   a. Includes Purchasing Form number in Comments/Requisition number field on PaymentNet for later tracking.

Purchasing Manager

11. Approves PCard transaction per TSK-U5348.04B Approving PCard Transactions.

Purchasing Assistant

12. Mails the yellow copy of the Purchasing Form with the transaction ID number and date to the department contact.

13. Cancels the original Purchasing Form in Banner noting code PCRD and indicates it was placed as a PCard order.

14. Files white copy of Purchasing Form and associated receipts in Purchasing main files under Requisition number.