



## Procurement Card Frequently Asked Questions

October 6, 2023

---

**Question:** How do I apply for a Purchasing Card?

- Departments with an identified need for a Purchasing Card must complete an approved [Purchasing Cardholder Request Form](#) with required information.
- Following verification of employment status by the Purchasing Department, prospective cardholders are required to complete a pre-requisite exam, attend Purchasing Card training, and sign a Purchasing Card Cardholder Agreement.

**Question:** Is activation required once I receive my Purchasing Card?

- Yes. Cardholders should activate their Purchasing Cards within thirty (30) days.

**Question:** What should I do with my Purchasing Card if I transfer to a different department?

- The cardholder must contact the Purchasing Card Administrator to coordinate the change and provide instructions for retaining the Purchasing Card.
- If a cardholder transfers to a new department and the purchasing card is not required, the Purchasing Card must be returned to the department liaison for cancellation. The Department must complete a [Purchasing Card Cancellation Form](#) and return to the Purchasing Department.

**Question:** What should I do with a Purchasing Card for a cardholder who no longer works at the University?

- The Purchasing Card must be immediately returned to the Department Liaison and expenses should be reconciled prior to departure.
- The Department Liaison must complete a [Purchasing Card Cancellation Form](#) and return the completed form to Purchasing.

**Question:** If I recently changed my name, am I required to get a new Purchasing Card with my new name?

- Yes. The department must submit a revised [Purchasing Cardholder Request Form](#) with required information.
- Following name update verification with Human Resources, a new application will be processed. Bank of America will send a new Purchasing Card directly to the cardholder. The old card must be discarded; preferably shredded.

**Question:** What are my responsibilities as a Cardholder? *Review the p-card manual.*

**Question:** What are my responsibilities as a Department Liaison? *Review the p-card manual.*

**Question:** How can I set up alerts for my Purchasing Card?

- Cardholders may receive electronic notifications into activity occurring on their Purchasing Card, including alerts to help reduce fraudulent activity. Reference Bank of America's [Corporate Card Alerts](#) and [Global Card Access User's Guide](#).

**Question:** What should I do if I find charges on my Purchasing Card for purchases that I did not authorize?

- Cardholders must complete a [Bank of America Commercial Card Claims Statement of Disputed Item](#) as soon as possible and attempt to resolve any disputes with Bank of America within sixty (60) days of the posting date.

**Question:** What should I do if a cardholder that I supervise made a purchase that was not an authorized expense?

- Reimbursement is required, a copy of the check to reimburse the University account for items purchased and a copy of the deposit transmittal form must be uploaded to the expense report.
- The Department Head should assess if the cardholder should retain Purchasing Card privileges.

**Question:** What should I do if a cardholder inadvertently made a personal purchase on their Purchasing Card?

- Reimbursement is required, a copy of the check to reimburse the University account for items purchased and a copy of the deposit transmittal form must be uploaded to the expense report.
- A memo signed by both the cardholder and Department Head explaining what occurred.

**Question:** What training and/or reference material is available related to using my Purchasing Card?

- PeopleSoft training and related resources are available at the PeopleSoft University Financial Systems [website](#). Click on the "Team Card/Procurement Card" section, which includes information on using My Wallet, creating/approving a Card Statement Expense Report, and other presentations/training videos. Any questions on available training/reference materials should be directed to the Purchasing Card Administrator.

**Question:** What should I do if I have a lost or missing receipt?

- In the event of a lost or missing receipt, cardholders must first contact the merchant to request a duplicate receipt. If unable to produce a duplicate itemized receipt, complete a [Purchasing Card Missing Receipt Affidavit](#) with all required information. Missing Receipt Affidavit should be on rare occasions and may not be used on a routine basis.

**Question:** What are allowable and prohibited Purchasing Card purchases?

- A partial listing of allowable and prohibited Purchasing Card purchases are included in the University's Purchasing Card Program Policies and Procedures User Manual located on the Purchasing [website](#).

**Question:** Can I use my Purchasing Card to pay for departmental celebrations or events, employee recognition or sympathy gifts (including purchasing gift cards)?

- No. A Purchasing Card may not be used for departmental celebrations, entertainment, business meals, etc. Prohibited transactions also include the purchase of any birthday/holiday/sympathy cards and/or stationery as well as the purchase of any decorations or holiday ornaments.

- The purchase of any cash value/gift cards is also prohibited. *See next question related to gift card provided as a promotional item as part of an otherwise legitimate business transaction.*

**Question:** If a gift card is included as a promotional item as part of an otherwise legitimate business purchase, am I allowed to complete the transaction and, if so, what should be done with the gift card?

- Yes. Any gift card provided as a promotional item should be retained by the department and used for future University legitimate business purchases. Supporting documentation should be sufficient to identify the promotional gift card amount and how the gift card will be used for future legitimate business purchases.

**Question:** Can I use my Purchasing Card to pay for training/registration fees?

- It depends. A Purchasing Card may be used for payment of local training without food and/or travel, virtual conference fees and professional webinars with prior department head written approval.
- No. Regular conference registration fees are not allowed to be paid with the Purchasing Card.
- No. Registration fees to be paid for student travel or student registration fees. Any questions on employee/student travel should be directed to the Office of the Controller.

**Question:** Can I use my Purchasing Card to purchase computers or other electronic devices?

- Yes, cardholders should utilize state contracts for desktops, laptops, tablets, servers, storage, and peripherals. See the Purchasing [website](#) for additional information. Computers are on state contract.
- Cardholders are reminded that the single transaction total value limit is \$4,999.99. This includes any shipping/handling, taxes, fees. If multiple computers or other electronic devices are to be purchased that exceed the single transaction limit of \$4,999.99; another procurement method should be used. For Dell only, end users may use the Dell punchout for orders exceeding the single transaction limit. See [How to Create a Dell Punchout in PeopleSoft](#)

**Question:** Can I use my Purchasing Card to purchase custom imprinted or emblematic items for work-related events?

- No. Cardholders may not use a Purchasing Card to purchase custom imprinted or emblematic items. This includes promotional supplies.

**Question:** Can I use my Purchasing Card to purchase breakroom supplies?

- No. The purchase of breakroom supplies including, but not limited to, food containers, microwaves, refrigerators, utensils, etc. is prohibited.
- Purchases for employee functions (e.g., food for consumption by state employees or food for staff meetings) are also prohibited. Cardholders should review University Policy BUSA 7.05, *Payment/Reimbursement for Personal Consumption Items at Employee's Official Headquarters* located on the University's Policies and Procedures [website](#) for procedures.

**Question:** Can I use my Purchasing Card to purchase cleaning supplies?

- No. Cardholders must consult with [Consolidated Services](#) on the availability of janitorial supplies and PPE supplies to include hand sanitizer, sanitizing wipes, air purifiers, air filters, paper towels and any other consumption supplies.

**Question:** Can I use my Purchasing Card to pay for printing services?

- For the Columbia campus, cardholders must confirm that their Department has contacted University Printing Services for a determination on whether the necessary printing/duplicating service has been evaluated by University Printing Services as required per University Policy ADV 5.04, *University Printing Services* located on the University's Policies and Procedures [website](#).

**Question:** Can I use my Purchasing Card to pay for stamps/postage?

- No. The purchase of stamps/postage is prohibited with the use of the purchasing card.

**Question:** Can I use my Purchasing Card to pay for express deliveries? Example, FedEx, UPS

- Yes.

**Question:** Can I let a coworker use my Purchasing Card?

- No. Cardholders are also reminded that it is prohibited for a transaction to be split across multiple cardholders.

**Question:** Can I request a monthly limit increase?

- By demonstrated need, written justification from the department head should be addressed to the Director of Purchasing. Requests for cardholder increased limits should have a minimum of six-month history and no exceptions for the entire unit. An audit of the entire unit will be conducted prior to approval.

**Question:** If an intended transaction exceeds my established single transaction limit, is it ok to split the transaction into two or more purchases?

- No. A cardholder must never split a transaction into multiple purchases to circumvent the established single transaction limit of \$4,999.99.
- Cardholders are also reminded that multiple transactions to be paid for on the same day with the same vendor and that cumulatively exceed the total value single transaction limit of \$4,999.99 may give the appearance of a split transaction. Alternate procurement methods (e.g., payment request, purchase order) should be considered or a sufficient explanation provided of how each transaction is separate and unrelated.

**Question:** Is the University sales tax exempt?

- No. The university is not exempt from sales and use tax; however, there are certain goods and services that the university is exempt or excluded from paying sales and use tax on. Refer to the "[Use Tax Matrix](#)" or contact Tax Management ([TAX@mailbox.sc.edu](mailto:TAX@mailbox.sc.edu)) with any questions.