

PCard Tips

- ◆ Original receipt, detailed packing slip or online order receipt is required for each purchase.
- ◆ Receipt must include line item detail (quantity, item description, amount, etc.).
- ◆ Business purpose on Log must adequately describe how the payment benefits the University.
- ◆ Tax should not be paid for goods and must be credited or reimbursed.
- ◆ Services are taxable.
- ◆ Travel transactions must be reconciled on the traveler's DPEZ and should not be reconciled on a zero dollar DPEZ unless there were no other expenses.
- ◆ Business cards, letterhead and envelopes may only be purchased from vendors who have been awarded the contract or from [UNM Copy Center](#). Contracted vendors must be used to comply with "UNM redesign 2007" and [UNM Identity Standards](#).
- ◆ Conference registration receipts – must include conference agenda and breakdown of costs
- ◆ A planned purchase exceeding \$5,000 should not be paid by PCard without special exception approval.
- ◆ Splitting/incremental purchasing are strictly prohibited.
- ◆ Lost/Stolen or compromised cards should be reported to Bank of America Security at 877-451-4602.
- ◆ The Cardholder is the **only** person authorized to use the PCard. The Cardholder **may not** share the card or card number with others.
- ◆ Reallocate transactions to appropriate Index and Account Code within 10 days from the date the transaction is loaded in Banner.
 - Transactions are loaded in Banner within 5 days of the transaction date (point of sale).
- ◆ Transactions not allocated to the appropriate Index/Account Code must be allocated by JV by the department and the incident will be noted as a card infraction.
- ◆ Special Exceptions are required in advance of a purchase or event as applicable.
- ◆ PCard Transaction Logs must be signed by Dean, Director, Department Head (Chair) or other as authorized by Signature Delegation Form
- ◆ All food/refreshments/paper goods require special exception approval in advance of the purchase.
- ◆ Computer and Server purchases
 - All Computers and Servers must be purchased through LoboMart
 - Inventory Control Form – Submit form and include a copy with the PCard Log
- ◆ Modification Form must be submitted when a new Supervisor or Department Head is assigned
- ◆ Declines – Call PCard Representative in Purchasing
- ◆ Hazardous Chemicals – must log in ICID