

**Purchasing Card Best Practices**  
**College of Engineering & Polytechnic Purchasing Center**

**GENERAL INFORMATION**

- **The Purdue University Purchasing Card Policies and Procedures document is linked [Here](#):**
- Purchasing Card is to be used for Purdue University authorized purchases only
- Purchasing Card is not to be used for any personal or faculty/staff travel
- The use of the card for unauthorized purchases may result in disciplinary actions, up to and including termination.
- Evidence of receipt (such as a cash register receipt, packing slip signed by receiver, notations on original documentation that the requestor has been contacted and agreed to receipt of the goods, or a printed receipt from the web site) must be supplied for all transactions.
- The record should note the name of the individual who placed the order, what was purchased, business purpose, amount, and date purchased.

**CYCLE INFORMATION**

- Pcard transactions are processed by JP Morgan Chase approximately within two business days
- The closing date for the monthly cycle will be on the 6th day of the month. Cycle runs from the 7<sup>th</sup> of the month through the 6<sup>th</sup> of the following month.
- Charges need to be reconciled by the 15th of the current month.
- Charges will be uploaded into SAP by the 30th of the current month. The charges will then post to the allocated account.

**PCARD BASICS**

- All Backup Documentation should be sent to the Purchasing Center within **3 days** of the transaction. When submitting documents, please only send 1 transaction per submission through the portal.
- QRG for submitting receipts can be found [here](#).
- Go to Purdue one Campus - <https://one.purdue.edu/>
  - Click the “Business Center Purchasing Forms” tile
  - Click “Pcard Receipt”
  - Subject Line of the submission:
    - Last Four of Card Number / Vendor / Amount / Date
      - Ex: 4023 / Home Depot / \$49.99 / August 14, 2023
- Every Transaction should have its own single file that includes all documents.
  - An itemized receipt for the purchase.
  - Approvals, as needed.
- Charges on PCards should be exempt from sales tax. An updated copy of the Indiana Tax Exemption Certificate can be found here: [Purchasing Card Manual See Appendix F](#)

- Our Indiana Sales Tax Exemption Number is: 00312372309
- Prepared Food not tax exempt; proceed with paying sales tax for this type of purchase.
- If placing orders with a vendor, please do not include your card details in an email or send photocopies of the card.
- Lists of outstanding backup documentation are sent throughout the month.
  - If you have not turned in your backup documentation, you will receive these messages.
  - You do not need to respond to the message, just submit the missing documents through the portal.
    - In the event you have already sent the requested documentation, you do not need to take any action.
    - Please note, it may take up to five (5) business days for our team to appropriately reconcile the charge, which may lead to requests for duplicate backup. We understand the confusion this may cause, but please be patient with our team as we are reconciling a large number of cards for the College.
  - PCards **should not** be used to purchase goods or services from vendors that are located in ARIBA.
    - This includes **Amazon**.
    - Is the item available through Ariba? Review Procurement's website.
      - <https://www.purdue.edu/procurement/purchasing/index.php>
    - Please use the "Place Order" form on the TDX Portal instead to place an order with one of these companies.

### **HOSPITALITY EXPENSES**

- Alcohol **cannot** be purchased on University Funds. Please **do not** use your PCard for alcohol purchases.
- Purdue's Hospitality Policy is located here:
  - <https://www.purdue.edu/policies/business-finance/ia1.html>
- Purdue's Hospitality Operating Procedures is located here:
  - <https://www.purdue.edu/treasurer/finance/controller/policies-procedures-resources/>
- To qualify for reimbursement, an itemized receipt must be provided as supporting documentation along with an explanation of the business purpose of the meal and who attended.
- A list of attendees must be included with the backup documentation for your purchase.
  - If less than 5 individuals, each name must be listed.
  - If more than 5 individuals, list the type of employees.

### **FRAUDULENT ACTIVITY**

- It is the responsibility of the cardholder to report fraud to the bank.
- If you receive an outstanding list with transactions you do not recognize, please call the number on the back of the card to report fraudulent activity.
  - Please send an email to [engrpcard@purdue.edu](mailto:engrpcard@purdue.edu) and [pcard@purdue.edu](mailto:pcard@purdue.edu) to report the fraudulent activity **after** you have contacted the bank. We will have additional documentation that you will need to complete.

### **CONTACTING JP MORGAN**

- Cardholders may contact JP Morgan for balance inquiries, to report fraudulent activity, or to speak to a customer service representative.
- Call the number on the back of the card.
- When prompted for your PIN or Access Code, enter the last four digits of your PUID Number.

### **OBTAINING LIMIT INCREASES**

- Department Cards cannot exceed \$3,000 per cycle. Named Cards have limits, but can be increased as needed.
- You can request a temporary increase for your card through concur. [Here](#) is the QRG on how to submit for an increase.
  - When asked for a cycle limit increase, please include the total limit being requested, not just the amount of increase being requested.
    - For example, if your limit is \$10,000, and you need an additional \$500 to process a transaction, enter \$10,500 for the requested cycle limit.
    - If you are unsure what the limit of your card is, you can request that information from JP Morgan or by emailing [pcard@purdue.edu](mailto:pcard@purdue.edu).

### **UNALLOWABLE EXPENSES**

The below types of purchase are not permitted to be made on a University Purchasing Card.

The following types of items may **not** be purchased with a purchasing card, regardless of the dollar amount.

- Personal transactions
- PayPal payments/transactions or similar services (as exception only)
- Cash advances (exception –Study Abroad Travel)
- Travel and Entertainment (T&E) transactions for faculty, staff and students that should otherwise be charged to the Travel Card (exception – Study Abroad Travel, Non-Employee Travel, One-Way and Daily Vehicle Rental)
- Meals for employees
- Alcoholic Beverages
- Escort Services

- Capital Assets (Any tangible item costing \$5,000 or more with expected useful life more than one year)
- Personal service payments (due to tax reporting issues).
- Cylinder Gases
- Commodities or services required to be purchased through current contracts or that are available through Ariba.
- Used at auctions or for used equipment on EBay. Please contact Procurement Services for assistance with these types of purchases
- Printing Services
- Any goods or services not directly benefiting Purdue University.
- Splitting large transactions into smaller transactions to circumvent the approved transaction limit.