

SOP – Biology Department Issuance of PCard

Department of Biology		Policy and Procedure	
SOP – Biology Department Issuance of PCard		Document ID:	
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Purpose

The purpose of this document is to identify Biology department Pcard issuing procedures.

Policy

This procedure applies to employees requesting a Pcard in the Department of Biology.

Definitions

Pcard: The University purchase card endorsed by Bank of America.

Pcard Holder: The person who has obtained approvals and permissions to have a Pcard. This person is typically the person that is responsible for reconciling the pcard.

Student Employee: An employee that is hired via student employment and is paid as a student. Because of the ability to transition and not be

disciplined under the same policies and procedures as staff and faculty, this employee classification is not allowed to obtain a pcard.

Temporary Employee: An employee that is hired via temp services in Human Resources. These employees have a short term duration of no more than six months in this capacity; because of the short term duration, this employee classification is not allowed to possess or obtain pcards.

Controls

Pcard Holders must have the approval of the supervisor and the Chair to obtain a PCard.

Before Chair signature, the Pcard request form will be routed to the Department Administrator for one additional level of check.

Responsibilities

Employees: Employees are responsible for ensuring that they have completed the necessary pcard training and passed the subsequent tests in order to obtain a pcard. The employee **MUST** not be a student or a temporary employee unless rare exceptions have been obtained.

Supervisors: Supervisors are responsible for ensuring that their employees have completed the necessary pcard training and passed the subsequent tests. The supervisor should ensure that a student or a temporary employee is not obtaining a pcard.

Department Administrator: The Department Administrator is responsible for verifying employee classification before the Department Chair signs approval for the employee to obtain a pcard.

Department Chair: The Department Chair is the last signatory approval in the department before the forms are approved by Purchasing.

Prerequisites and Required Items

The following Banner training classes are required to obtain a pcard:

- Pcard Training
- Pcard Web Exam
- Pcard for Air Travel (optional)
- Pcard Web Exam for Air Travel (optional)

Detailed Steps for Obtaining a Pcard at the Departmental Level

An employee must complete the required training and satisfactory complete the exam with a passing score in order to obtain a pcard. Once the employee has completed all the necessary training, the employee should complete the Pcard Request to Obtain Pcard Form and the Pcard Certification Acknowledgement.

The employee should also attach the training certificate as proof of class completion.

The employee then should have their supervisor endorse and give their approval for the employee to obtain a pcard.

Once, the employee obtains the supervisor approval, the employee can either turn the form into the Chair's or to the Department Administrator's box.

1. If the employee routes the form to the Chair's box, the Chair will verify that the Department Administrator has initialed the form.
 - a. If the Department Administrator has initialed the form, this indicates that the Department Administrator has reviewed the form for training requirements, completeness, accuracy, and employee classification.
 - b. If the Department Administrator has not initialed the request for pcard form, the Department Chair will route it to the Department Administrator for the above mentioned review.
2. If the employee routes the form to the Department Administrator, the Department Administrator will review the form for training requirements, completeness, accuracy, and employee classification.
 - a. If everything is acceptable, then the Department Administrator will initial the form and forward it to the Department Chair's office for signature and approval.
 - b. If there are any problems, the Department Administrator will return the form to the employee citing what problems need to be addressed.
 - c. If the problem is an unauthorized employee classification, the employee will be denied a pcard unless they request

in writing from the Purchasing Pcard Manager special exception. These special exceptions will then be evaluated at the Department level for approval before proceeding. A copy of the exception will be needed to be sent with the request form.

Once all departmental approvals are obtained, the pcard request form is then routed to the department accounting office. At this point a copy of the request form is copied with all supporting documentation and then routed to the Purchasing office for processing and further approval.

Records Management

All purchase request documentation to obtain a pcard are maintained in the Department for five years. At the end of the fifth year, all records are sent to Cintas, Inc. for secure shredding. Initial requests are maintained in the Biology pcard files by employee last name.

Approvals and Authorization

Name:		Title:
Revision Number	Approval Date	Comment

Revision Detail:

Current Version Date:		Next Review Date:
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