

# **UNM Department of Biology**

## **Issuance of Purchasing Cards and Fuel Cards SOP**

### **Purpose**

The purpose of this document is to identify procedures for the issuance of PCards and FCards within the Department of Biology.

### **Policy**

This procedure applies to employees requesting a PCard or FCard in the Department of Biology.

### **Definitions**

P/Fcard: The University purchase/fuel card endorsed by Bank of America.

P/FCard Holder: The person who has obtained approvals and permissions to have a P/FCard. This person is typically responsible for reconciling the P/Fcard charges in Chrome River.

Student Employee: An employee who 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 who is hired via temp services in Human Resources or hired by the Department as a temporary employee. 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**

P/Fcard Holders must have the approval of the supervisor and the Chair to obtain a Pcard.

Before the Chair's signature, the P/Fcard request form will be routed to the Manager of Research Administration for one additional level of check.

### **Responsibilities**

Employees: Employees are responsible for ensuring that they have completed the necessary P/FCard training and passed the subsequent

tests in order to obtain a P/Fcard. The employee must not be a student or a temporary employee.

**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.

**Manager of Research Administration:** The Manager of Research Administration 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 training classes are required to obtain a Pcard:

- PCard Program—EOD 346
- PCard for Travel—EOD 343

The following training class is required to obtain an FCard:

- Fuel Card Training—EOD 348

### **Detailed Steps for Obtaining a PCard at the Departmental Level**

An employee must complete the required training and satisfactorily complete the exam with a passing score in order to obtain a P/Fcard. Once the employee has completed all the necessary training, the employee should complete the P/FCard Application and the P/FCard Certification Agreement.

The employee then should have their supervisor endorse and approve the employee to obtain a P/Fcard.

Once, the employee obtains their supervisor's approval, the employee can turn the form in to the Accounting Office. If instead the employee first routes the form to the Chair's box, the Chair will verify that Accounting has initialed the form—which can cause a delay in the process. It is best to send the form directly to Accounting.

1. If the Accounting has initialed the form, this indicates that Accounting has reviewed the request for training requirements, completeness, accuracy, and employee classification.

2. If everything is acceptable, then Accounting will initial the form and forward it to the Department Chair's office for signature and approval.
3. If there are any problems, Accounting will return the form to the employee, citing what problems need to be addressed.
4. If Accounting has not initialed the request for P/Fcard form, the Department Chair will not sign the form.

Once all departmental approvals are obtained, the P/Fcard 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.

### Approvals and Authorization

Name:		Title:
Revision Number	Approval Date	Comment
1	3/20/13	Approved—Richard Cripps, Chair
2	8/2/2018	Approved—William Pockman, Chair

**Revision Detail:**

Current Version Date:		Next Review Date:
Revision Number	Revision Date	Description and Author
1	3/20/13	Update PCard Issuance Information—Donna George
2	8/18/18	Updated to include FCards and incorporate UNM's transition to Chrome River—Nathan Holscher