Pcard Training

UNIVERSITY OF OKLAHOMA HEALTH SCIENCES CENTER
Contact Information

• Financial Services
  • Accounts Payable
    • Pcard
  • Pcard@ouhsc.edu
• (405) 271-2410
• 865 Research Parkway, Suite #590
• https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard
What is a Pcard?

- Pcard = Procurement Credit Card
- Pcard is used for small dollar, low-risk purchases
  - Small dollar = $5,000 or less
  - Split purchases are a direct violation of Regent’s Policy
- Pcard is a procurement tool that provides payment flexibility
- Vendors paid with Pcard do **not** have to be established in PeopleSoft
Purchasing Methods

• Pcard
  • Office supplies, lab supplies, books, etc.

• Travel Card
  • Business travel expenses and business meals only

• Vouchers
  • Insurance, royalties, scholarships, etc.

• Requisitions/Purchase Orders
  • Orders greater than $5,000, services, contracts, etc.
Pcard is a Privilege

• Pcard should **not** be used to circumvent established policies or procedures

• Possible consequences of improper usage
  • Warning sent to Cardholder, Approver, Business Manager and/or Department Head
  • Card suspension
  • Retraining of cardholder
  • Restricted transaction limits
  • Card cancellation
  • Refer to Internal Auditing and Legal Counsel
Cardholder Responsibilities

• Protect the security of your card
• Ensure that you are the only user of the card
• Ensure purchases follow the Pcard Guide
• Obtain appropriate documentation for every transaction
• Submit documentation to your department
• Reconcile and sign off on all transactions
• Respond timely to online review (audit) requests
• Monitor transactions frequently for unusual activity
Approver Responsibilities

• Review and approve Pcard applications
• Monitor usage and ensure cards are not shared in the department
• Ensure goods/services are received and used appropriately
• Ensure appropriate documentation is obtained and retained
• Sign off on transactions to ensure
  • Compliance with Pcard Guide
  • Correct expense allocation
Application Process

• Apply online
  • [https://apps.ouhsc.edu/FinancialServices/](https://apps.ouhsc.edu/FinancialServices/)

• Information needed
  • HR name and employee ID
  • Approver name and email address
  • Department name/section
  • Credit limits
  • Accounting information
  • Billing information
Application Process

• Cardholder submits to Approver
• Approver gets email notification of pending application
• Approver reviews application and submits to Pcard
• Pcard submits to Bank of America
• Card is available within 3 – 7 business days
• Training is required
• Card mailed to campus office or picked up from Accounts Payable
Pcard and PIN Activation

• Card is activated by calling the bank

• Full card account number is entered

• Verification ID is entered
  • Verification ID is six digit HR ID plus three zeroes
    • Example: 512345000
  • HR IDs beginning with zero, Verification ID will be 111 and then your HR ID
    • Example: 111012345

• PIN is created by the cardholder
Amazon Business

- Partnered with the State of Oklahoma’s Amazon Business account
- Tax exemptions for most purchases
- Free Amazon Prime
  - Cannot be used for personal purchases
  - All purchases made through the account are visible and audited
- Accept invitation from no-reply@amazon.com
- May appear to be spam
- Sent after Pcard training
Tax Exemption

• Exempt from sales tax in Oklahoma

• Also exempt in reciprocal states
  • Florida
  • Illinois
  • Kentucky
  • Maine
  • Missouri
  • New Jersey
  • North Dakota

• Vendors may require letter or tax exemption number

• Check with Customer Service prior to purchase

• Exemption listed on Pcard sleeve
Pcard Protection and Security

• The Cardholder is the **only** authorized user of the card
• Protect physical card and card number
• Be aware of your surrounding
• Use reputable vendors
• Ensure online purchases are made on a secure site
• Do not email your card number
• Do not keep copies of your card number, physically or electronically
Pcard Purchases

• Posted to OpenBooks.ok.gov and subject to Open Records
• Must be $5,000 or less
• Must comply with Small Dollar Policy
• Must comply with Pcard Guide
• Must be used for business purposes only
• Will randomly be selected for audit by Pcard office
  • Documentation is scanned to Pcard@ouhsc.edu for review
Pcard Guide

• Pcard payments have less oversight and present more risk

• Charges authorized elsewhere are not necessarily allowable on Pcard
  • Grants
  • Foundation
  • Accounts Payable

• Guide serves as a reference but is not all-inclusive

• Guide includes examples, explanations and GL account codes
  • https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard/Pcard-Guide

• Contact Pcard@ouhsc.edu for questions
## Yes List

<table>
<thead>
<tr>
<th>Appliances</th>
<th>Books</th>
<th>Bottled Water/Beverages</th>
<th>Cellular/Smart Phone Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cellular/Smart Phones</td>
<td>Classroom Materials/Educational Supplies</td>
<td>Coffee/Coffee Supplies</td>
<td>Computer Parts/Technology Supplies</td>
</tr>
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<td>Copies/Prints</td>
<td>Décor</td>
<td>Electronic/Digital/Online Materials</td>
<td>Electronics</td>
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<tr>
<td>Employee Testing/Exams</td>
<td>Employee Training</td>
<td>Equipment/Equipment Parts</td>
<td>Event Supplies</td>
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<td>Freight/Shipping/Handling</td>
<td>Furniture</td>
<td>Greeting/Seasonal Cards</td>
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<td>Laundry Services</td>
<td>Notary/Notary Renewal</td>
<td>Office Supplies</td>
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<tr>
<td>Patient Supplies</td>
<td>Personal Safety Supplies</td>
<td>Phone/Data/Internet Services</td>
<td>Photos/Videos</td>
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<td>Physician Credentialing</td>
<td>Pike Pass</td>
<td>Resale Items/Merchandise</td>
<td>Shop Supplies</td>
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<tr>
<td>Subscriptions</td>
<td>Uniforms/Clothing Apparel</td>
<td>Webinars</td>
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<td>No List</td>
<td></td>
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</tr>
<tr>
<td>---</td>
<td></td>
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</tr>
<tr>
<td><strong>Advertising/Job Posting</strong></td>
<td><strong>Alcohol</strong></td>
<td><strong>Ammunition</strong></td>
<td><strong>Awards</strong></td>
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<tr>
<td>Bottled Water Service/ Water Machine Rental</td>
<td>Cash</td>
<td>Certification/Accreditation</td>
<td>Cloud/Data Storage</td>
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<tr>
<td>Coffee Service/ Coffee Machine Rental</td>
<td>Conference Registrations</td>
<td>Construction/Renovation</td>
<td>Contracts/Agreements</td>
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<tr>
<td>Desktop Computers/ Laptop Computers</td>
<td>Domain Names</td>
<td>Entertainment/Events/ Activities</td>
<td>Firearms</td>
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<td>Food</td>
<td>Foreign Vendors</td>
<td>Fuel</td>
<td>Gift Cards/Gift Certificates</td>
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<td>Gifts</td>
<td>Insurance</td>
<td>Labor/Maintenance/Repair</td>
<td>Late Fees</td>
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<td>Licenses</td>
<td>Lodging</td>
<td>Memberships</td>
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<tr>
<td>Personal Expenses</td>
<td>Photography/Videography</td>
<td>Postage Stamps</td>
<td>Printers</td>
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<td>Prepayment</td>
<td>Radioactive Materials</td>
<td>Recruitment/Promotional Items</td>
<td>Rent/Lease Equipment</td>
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<td>Royalties</td>
<td>Services</td>
<td>Software/Software Renewals/ Software Maintenance</td>
<td>Tobacco</td>
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<tr>
<td>Tuition</td>
<td>Utilities</td>
<td>Warranties</td>
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</tbody>
</table>
Pcard Declines

- Pcards can be declined at the point of sale for various reasons
  - Incorrect PIN
  - Card not activated
  - Limits exceeded
  - Suspected fraudulent activity
  - Vendor categories
    - ATMs, hotels, pawn shops, etc.

- Contact Bank of America or Pcard@ouhsc.edu if declined
Documentation

• Must be obtained for every charge, including reoccurring charges
• Must be retained in accordance with the Record Retention Policy

• Types include
  • Invoice
  • Credit card receipt
  • Sales slip
  • Online order summary

• Must contain
  • Vendor name
  • Description/Itemization of purchase
  • Total amount charged, including shipping
  • Shipping address
Itemized Documentation

Order Details
Ordered on July 5, 2017 | Order# 113-6321667-9113061

Shipping Address
Pcard Holder
865 Research Parkway
Oklahoma City, OK 73104
United States

Payment Method
Debit **** 9276

Order Summary
Item(s) Subtotal: $6.59
Shipping & Handling: $0.00
Total before tax: $6.59
Estimated tax to be collected: $0.00
Grand Total: $6.59

Transactions

Generic Everconn Apple iPad Dock Connector to VGA Cable Adapter, iOS 5.1 compatible, Enjoy iPad Video and Audio on Big TV Screen or Projector
Sold by: ICW Retail
$6.59
Condition: New - High Quality Fast Shipping
Buy it again

Write a product review

Archive order
Itemized Documentation

Supplies for booth at vendor fair:
- Basket
- Ribbon
- Jars
Reconciliation Process

**Accountholder/Cardholder**
- Ensure purchase is allowable
- Ensure documentation is sufficient
- Update default chart field spread, if necessary
- Add comments, if required
- Sign off on transactions before cutoff date

**Approver**
- Ensure purchase is allowable
- Ensure documentation is sufficient
- Ensure chart field spread is accurate
- Add additional comments, if necessary
- Sign off on transaction before cutoff date
Works Welcome Email

• From Works on behalf of Pcard – Bank of America

• First link
  • Initial setup
  • Used only once

• Username

• Email address

• Second link
  • Works link to bookmark
Works Initial Login

• Initial Security Check  
  - Enter email address or HR ID

• Initial Password Setup  
  - Eight characters  
  - One alpha and one numeric required  
  - Three security questions
Works Regular Login

- Login Name
  - HR ID
  - Password

- Works password
  - No single sign on
  - Password reset
    - Click Forgot your password?

![Bank of America Merrill Lynch Works](image)
Works Homepage – Accountholder/Cardholder

![Bank of America Merrill Lynch Works Homepage](image)

### Action Items

<table>
<thead>
<tr>
<th>Action</th>
<th>Acting As</th>
<th>Count</th>
<th>Type</th>
<th>Current Status</th>
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<tbody>
<tr>
<td>Sign Off</td>
<td>Accountholder</td>
<td>6</td>
<td>Transaction</td>
<td>Pending</td>
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</tbody>
</table>

1 item

### Accounts Dashboard

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Account ID</th>
<th>Credit Limit</th>
<th>Current Balance</th>
<th>Available Credit</th>
<th>% of Credit Limit Used</th>
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</thead>
<tbody>
<tr>
<td>PCARD HOLDER</td>
<td>6300</td>
<td>25,000.00</td>
<td>31.08</td>
<td>24,968.92</td>
<td>0%</td>
</tr>
</tbody>
</table>

1 item
Pending Transactions

![Pending Transactions Image]

<table>
<thead>
<tr>
<th>Document</th>
<th>Date Purchased</th>
<th>Date Posted</th>
<th>Vendor</th>
<th>Purchase Amount</th>
<th>Sales Tax</th>
<th>Allocation</th>
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<tbody>
<tr>
<td>TXN00415070</td>
<td>12/13/2018</td>
<td>12/17/2018</td>
<td>OFFICE DEPOT #1079</td>
<td>70.26</td>
<td>0.00</td>
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<td>TXN00415070</td>
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<td>12/17/2018</td>
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<td>126.72</td>
<td>0.00</td>
<td>602700-STATE-COM072-00211-00000-(None)-2019--</td>
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<tr>
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<td>12/17/2018</td>
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<td>multiple</td>
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<tr>
<td>TXN00415070</td>
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<td>12/17/2018</td>
<td>FEDEX 31061698</td>
<td>121.70</td>
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</tbody>
</table>
Allocate/Edit
See More

<table>
<thead>
<tr>
<th>All Values</th>
<th>Description</th>
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<tbody>
<tr>
<td>600100</td>
<td>SUPP-LABORATORY</td>
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<tr>
<td>600300</td>
<td>UNIFORMS</td>
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<tr>
<td>600400</td>
<td>SUPP-LAB ANIMALS</td>
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<td>RADIATION</td>
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<tr>
<td>602200</td>
<td>SUPP-OTHER</td>
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<tr>
<td>602300</td>
<td>SUPP-COMPUTER &amp; TECH</td>
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<tr>
<td>602500</td>
<td>SUPP-ONLINE MATERIALS</td>
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<tr>
<td>602600</td>
<td>SUPP-PHOTOGRAPHY</td>
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<tr>
<td>602700</td>
<td>SUPP-OFFICE</td>
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</table>
Split Chart Field Spread

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
<th>GL01: Account</th>
<th>GL02: Fund</th>
<th>GL03: Org</th>
<th>GL04</th>
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</thead>
<tbody>
<tr>
<td>602700</td>
<td>OFFICE DEPOT #1079 - Purchase</td>
<td>602700</td>
<td>CLNOP</td>
<td>COM220</td>
<td>00124</td>
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</tbody>
</table>

Purchase Amount: 70.26  Tax Amount: 0.00  Allocation Total: 70.26  (100%)

Reference & Tax:
- Reference:
  - 1 line
  - 2 lines
  - 3 lines
  - 4 lines
  - 5 lines
  - 6 lines
  - 7 lines
- Tax Status: Sales Tax Included
- Goods & Services: 70.26
- Tax Total: 0.00
- Use Tax: 0.00
- Shipping: 731045036
Sign Off

![Bank of America Merrill Lynch dashboard]

### Transactions - Account Holder

<table>
<thead>
<tr>
<th>Document</th>
<th>Date Purchased</th>
<th>Date Posted</th>
<th>Vendor</th>
<th>Purchase Amount</th>
<th>Sales Tax</th>
<th>Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>TXN00415070</td>
<td>12/13/2016</td>
<td>12/17/2016</td>
<td>OFFICE DEPOT #1079</td>
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<td>602700-CLN0P-COM612-00124-00000-(None)-2019--</td>
</tr>
</tbody>
</table>

0 Selected | 976 Items

Show 10 \* per page

[Sign Off button highlighted]
Optional Comments

Confirm Sign Off

Sign off 1 transaction(s).

Comments: Office supplies.

OK  Cancel
Mass Allocate/Sign Off

![Bank of America Merrill Lynch Works screenshot](image)

**Transactions - Accountholder**

<table>
<thead>
<tr>
<th>Document</th>
<th>Date Purchased</th>
<th>Date Posted</th>
<th>Vendor</th>
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<th>Sales Tax</th>
<th>Allocation</th>
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</thead>
<tbody>
<tr>
<td>TXN00415070</td>
<td>12/13/2018</td>
<td>12/17/2018</td>
<td>OFFICE DEPOT #1079</td>
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<td>12/17/2018</td>
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<td>622700-CLNOP-COM612-00124-00000-(None)-2019-</td>
</tr>
</tbody>
</table>

3 Selected | 975 items

Show 10 ▼ per page
Works Homepage - Approver

• Acting As Accountholder
  • Transactions not signed off on by the cardholder
  • Act as the accountholder when signoff cannot be completed by the cardholder
  • After sign off as the accountholder, transactions are not visible to the cardholder

• Acting As Approver
  • Transaction signed off on by the cardholder
  • Act as the approver for all transactions
  • After sign off as the approver, no other changes can be made in Works

<table>
<thead>
<tr>
<th>Action</th>
<th>Acting As</th>
<th>Count</th>
<th>Type</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
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<td>Accountholder</td>
<td>974</td>
<td>Transaction</td>
<td>Pending</td>
</tr>
<tr>
<td>Sign Off</td>
<td>Approver</td>
<td>172</td>
<td>Transaction</td>
<td>Pending</td>
</tr>
</tbody>
</table>
Cutoff Dates

• Billing cycles cross months
• Named by when they begin
• Dates vary each month
• Separate cutoff dates for each cycle
• 24 hour posting delay
• Works available 24/7
• Calendar events available on Pcard website
AP Pcard Website

• General Information

• Cutoff Information
  • List of current year dates
  • Calendar events as reminders

• Forms
  • Receipt and Agreement
  • Property Clearance Checklist
  • Tax Exemption Letter

• Pcard Application

• Pcard Guide
  • PDF document
  • Quick reference chart
    • GL Codes
    • Clarifications

• Policy and Procedures
  • Pcard Policy
  • Works procedural information

https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard
Next Steps

• Apply for a Pcard
• Review the Pcard Guide
• Discuss internal processes with your department
• Accept invitation to Amazon Business account
• Contact Pcard@ouhsc.edu with questions
Questions?