



UNLV | STUDENT LIFE
Student Life Business Services

P-Card Training

REFRESHER & LATEST UPDATES

Introduction & Overview

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What is a P-Card?

- ▶ A Purchasing Card. The UNLV P-Card program has been established to provide an efficient and cost effective means that empowers individual employees to make small dollar purchases, and at the same time, reduce the costs associated with initiating and paying for those purchases.
- ▶ The P-card is the preferred method of making purchases of goods \$5,000 or less. With written approval from the P-card office, the P-card can be used for some services of \$5,000 or less that do not require any written agreements (terms and conditions) to be signed.

Rules and Restrictions

- ▶ P-Card cannot be used for any restricted items unless pre-approved by special exception. Contact the P-card team or your account manager prior to making any purchase of which you are uncertain
- ▶ Cardholders are expected to exercise sound business judgement when making purchases.
- ▶ Please Contact the P-card team or your account manager before making any purchases that are questionable, may be construed as inappropriate or which the cardholder does not know to be reasonable and necessary for the official business purposes of the university

Rules and Restrictions (Part 2)

- ▶ These violations may result in IMMEDIATE SUSPENSION of the P-card account until the necessary corrections are communicated to the P-card team:
 - ▶ Failure to reconcile or correctly reconcile transactions by the UNLV established deadline
 - ▶ Allowing others to use your card or sharing your account number with others
 - ▶ Any and all personal purchases
 - ▶ Splitting transactions to avoid single transaction limits

Most frequent Violations Observed by SLBS

- ▶ Inappropriate actions not in compliance with stated P-card policy
- ▶ Will intent to disregard established policies and procedures
- ▶ Circumventing processes such as Expense Reports or Purchase Order transactions that are restricted due to existing UNLV policies
- ▶ Transactions that require prior approval
- ▶ Transactions that include sales tax

Possible Consequences

- ▶ Suspension of the P-Card
- ▶ Mandatory retraining
- ▶ Revocation of P-card
- ▶ Termination of Employment
- ▶ Criminal Prosecution

Software Purchases

- ▶ Software and license purchases are required to obtain Accessibility Resource Team (ART) review and approval before P-card can grant approval. This includes: one-time purchases, renewals, and recurring purchases. Recurring purchases need to be approved by P-card/Purchasing.
- ▶ Student Life Technology (SLM) is the Student Life first point of contact for software and technology purchases.

P-Card for Employee, Student, and Team Travel

- ▶ Travel Expenses must conform to the policies and procedures listed on the UNLV Travel Program Website. It is recommended that cardholders regularly check the UNLV Travel Program Website to ensure you are following the most current policies prior to purchasing travel related items.
- ▶ Travel expenses that are allowed to be purchased on the P-card are:
 - ▶ Airfare
 - ▶ Ground Transportation
 - ▶ Other forms of Transportation
 - ▶ Lodging (fees considered in room rate, not as taxes)
 - ▶ Registration

P-Card for Employee, Student, and Team Travel (Part 2)

- ▶ **NOTE:** Unless Hosting, meals are not allowed to be paid by P-card while a cardholder is in travel status. Please visit the UNLV travel program website regarding per diem meal allowances. Spend authorizations need to be included in the descriptions of the travel expenses purchased on the P-card.

Departmental Card

- ▶ Departmental cards are approved for very low, single transaction, and monthly overall spending limits, and are not issued to an individual
- ▶ It is important that these cards and card numbers are safeguarded against use by unauthorized individuals
- ▶ The department must not develop an internal policy to ensure the security on the card
- ▶ The department card coordinator will be ultimately responsible for the security of the card
- ▶ Departmental cards are to be signed out and signed back in with the department on the same day
- ▶ Departmental cards cannot be used for travel

Authorized Users

- ▶ The individual P-card may only be used by the UNLV employee whose name appears on the card
- ▶ An approved cardholder account application and cardholder agreement form must be on file with the purchasing card program and the applicant must have completed the initial and any follow up Purchasing Card training
- ▶ The departmental P-card can be used by authorized members of the department who have been granted permission by the approving official responsible for the P-card and must have completed the departments internal P-card training

Necessary Documentation

- ▶ A proper receipt must include:
 - ▶ Card number (with appropriate numbers blacked out)
 - ▶ Itemized description of goods purchased
 - ▶ Vendor name
 - ▶ Transaction date
 - ▶ Transaction total
- ▶ If you lose a receipt please use Affidavit of Lost or Unavailable Receipt Form

Things to Keep in Mind

- ▶ We are subject to public scrutiny – by the press, legislators, members of the public, and suppliers to name a few. This includes your P-card purchases
- ▶ Be sure your purchases are appropriate and your documentation and approvals are complete. When in doubt, ask before proceeding with your purchase.

P-Card Verification

- ▶ PCV should be reconciled on a weekly basis
- ▶ PCV should not contain more than 5 transactions
- ▶ PCV should only contain one Program number
- ▶ Host forms must include meeting agenda and attendee list
- ▶ Student activities transactions must include a program/event flyer or event detail form
- ▶ Student activity supplies must be detailed in memo field in Workday
- ▶ Travel expenses must state the spend auth number in memo detail of the transaction

Helpful Resources

- ▶ Workday
 - ▶ Verify Procurement Card Transactions
 - ▶ Find Procurement Card Verification
- ▶ P-card manual:
 - ▶ <https://www.unlv.edu/purchasing/pcard>
- ▶ Campus wide contract:
 - ▶ <https://www.unlv.edu/purchasing/contracts>

Training Complete

- ▶ You have now completed this training:
- ▶ For any further questions please contact your Account Manager with Student Life Business Services!
- ▶ Have a great day!

