

P-Card Points to Ponder

University of Nebraska – Lincoln

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Business Purpose

P-Card policy defines business purpose as identifying why a purchase was necessary and states that a business purpose must be included within the documentation. Examples of common/acceptable business purpose are:

- Research/lab
- Extension/outreach
- Resale
- Instruction/classroom
- Supplies
- Repairs and maintenance
- Employee development

The general ledger account code the expense is coded to is not a business purpose. General ledger codes are used for financial reporting and do not indicate the reason for a purchase. A recommended best practice is to use a transaction voucher which includes the option to check the box of the appropriate business purpose.

Card Limits

A cardholder's spending limits (single purchase and per cycle) are determined by the department when the P-Card application is completed. If a cardholder or department is ever unsure of these limits this information is available on the paperwork the cardholder received with his/her card or can be requested from the P-Card Team.

If a limit change is necessary, a request may be made in writing at any time to the P-Card Team. The Approving Official or Department Chair should make the request on behalf of the cardholder. Email is the preferred medium. The following details should be included: cardholder name, limit request, justification and the time period. The change is effective when the department receives an email confirmation of approval.

Training

The P-Card team is excited to announce the launch of four videos designed to supplement current P-card training. The videos focus on:

- P-Card Program Cycle
- Using Your P-Card
- Purchase Documentation
- Troubleshooting P-Card Use

All card program participants are invited to attend the regularly scheduled training sessions to view the videos and provide feedback. If you plan to attend, please be sure to register at training.unl.edu.

Staff Update

Jenny Schnase accepted a position in another campus unit and **Crystal James** is the interim manager of UNL's Card Programs. Crystal James provides support for limit changes, policy enforcement, and vendor/business assistance (i.e., MCC) and can be contacted at 472-4400 or crystal.james@unl.edu. Contact information for the entire P-Card team is:

Pam Boyle

Card Programs Coordinator
472-5613
pboyle2@unl.edu.

- Supports Cardholders (i.e., declines; fraud/lost card/disputes; new applications; closing accounts)
- Supports Approving Officials
- Provides P-Card training

Marlene Pyatt

Purchasing Card Associate
472-8778
mpyatt2@unl.edu.

- Supports Reconcilers
- Provides proper GL coding assistance
- Provides Reconciler, Group Travel and P-Card training

Tanner Weir

Student Worker
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- Supports Cardholders (i.e., new applications; closing accounts; declined transactions)