

P-Card Procedures

A p-card is issued based on business need and with approval from your department; it is not an entitlement nor reflective of title or position. P-cardholders who do not comply with policy or procedure may have their card privileges temporarily or permanently revoked by their department or University Financial Services.

- Cardholders should demonstrate an understanding of what constitutes an authorized (or unauthorized) p-card purchase.
- Cardholders are responsible for ensuring their expense is signed off and documentation is submitted to their department by the required due date.
- Cardholders may be held personally responsible for purchases not authorized by the department or not allowed per university policy.

Each card is assigned an approver and authorizer within your department. If you are an approver or an authorizer with a p-card, your p-card expense must be reviewed and authorized via signature by your manager monthly.

What types of purchases are authorized for p-card?

P-Card expense must be within university policy, and must serve a legitimate business purpose. Review [Authorized and Unauthorized P-Card Purchases](#) (pdf).

P-Card at Boise State

Boise State University has approximately 800 p-cards assigned to over 175 different departments with purchases by the campus community averaging \$1.5 million monthly. P-Card allows staff to purchase what they need, when they need it. But, with this convenience comes responsibility; controls are necessary to ensure funds are spent wisely and in accordance with university policy.

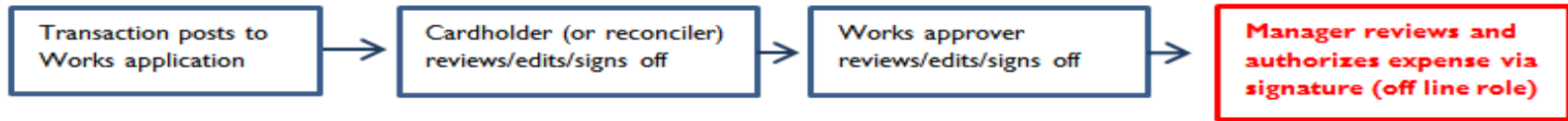
The University sets controls by establishing policy and procedure based on best practice guidelines for university card programs. Departments provide controls by reviewing, approving and authorizing p-card expense. Our auditors ensure departments maintain appropriate controls by reviewing transactions and conducting informal and formal audits on a regular basis.

- P-cards have a maximum single transaction limit and monthly limit based on purchasing need. Departments select card limits based on purchasing needs. Here's the standard card limits:

Spend	Standard Limit (used for most cards)	\$1,999 Maximum Per Transaction	\$10,000 Maximum Monthly
Spend	Standard Limit (low volume use)	\$1,999 Maximum Per Transaction	\$5,000 Maximum Monthly
Spend	Standard Limit Plus (high volume use)	\$2,999 Maximum Per Transaction	\$20,000 Maximum Monthly

- Certain types of merchants are restricted: [Restricted Merchant Categories for P-Card](#)
- Some types of purchase are not allowed on p-card: [Authorized and Unauthorized P-Card Purchases](#)

Departments Provide Cardholder Due Date for Sign Off and Submission of Documentation.
Check with your P-Card Approver for instruction.



- **Cardholder/Reconciler Review and Sign off** (Use the [Reconciler Agreement](#) to designate a card reconciler)

Cardholder (or assigned reconciler) reviews, allocates and signs off on expense in Works. Each cardholder is required to review and sign their printed cardholder statement. The statement, receipts and other required documentation must be submitted to the department approver in an organized manner by date provided by department. Department is responsible for maintaining p-card documentation for 5 years (cardholders may keep their own copies).

- **Approver Review and Sign off** (Use the [Approver Agreement](#) to designate an approver)

The p-card approver is responsible for reviewing and/or editing cardholder allocation entries in Works by the university due date prepping the transactions for upload to university financials (OFC). Approver completes review by signing off on transactions in Works. The approver is responsible for reporting non-compliance issues discovered during the approval process to the cardholder and authorizer (manager). Approvers report identified non-compliance issues to the cardholder via the p-card [Non-Compliance Warning Form](#) which is attached to cardholder statement for manager review.

- **Manager Authorization of Expense via Signature**

The manager (Department Head, Director, Dean, VP, or Business Manager) is responsible for reviewing and authorizing p-card expense for cardholders in their area via signature. The authorizer has a fiduciary responsibility to ensure expense is in compliance with university policy and serves a legitimate business purpose. The authorizer is responsible for ensuring non-compliance issues are resolved or escalated to the university p-card administrator or appropriate official in a timely manner.

- Signature form: Use the *Works Authorization of P-Card Expense* form (scheduled Works report) as the expense authorizer signature form. Signed report must be provided for audit review upon demand.

Delegation of authorizer signing authority must be approved by the respective dean or V.P. for the area and submitted to the university p-card administrator for review and approval by U.F.S. Department is responsible for maintaining documentation defining authorizer role and/or delegated signature authority in place for their area.

Guidelines For Purchasing Goods And Services-

Orders or commitments by faculty or staff are not binding on the University unless supported by a valid purchase order (PO), an approved contract, or the authorized use of an institutional procurement card (P-Card).

P-card is used for authorized business purchases up to your card's per transaction limit. Most cards have a \$1,999 or \$2,999 per transaction limit, and \$5,000 to \$20,000 monthly spend limit. Check with your department for your card limit.

Do not split purchases to bypass card limit. Cardholders can request temporary p-card limit increases to handle certain payments exceeding card per transaction limit to vendors who require credit card payment or if credit card payment is determined as the best payment method. Card limits may be increased temporarily for the following:

- Travel expense for air, hotel, registration
- Venue rental, caterers
- Registration or membership renewal or payment

To request a temporary increase, submit a [P-Card Account Maintenance Request](#) form to pcard@boisestate.edu. Form must be signed by your approver and manager. Provide supporting documentation such as copy of the approved travel authorization, approved contract, or invoice/registration form from the vendor.

For Purchases Over \$2,999: Use *OFC* Standard Purchasing Requisition; or use the *OFC* Payment Request for approved contract payments. View [Purchasing Process Quick Reference](#) for detail.

Employee Reimbursement –Use personal funds for business-related non-travel purchases only if approved in advance by your department. Reimbursement is subject to department approval, availability of funds and compliance with university policies.

New to the university? Need a refresher regarding university purchasing processes?
Attend a Purchasing 101 Workshop. Register online with Employee Learning and Development
<https://hrs.boisestate.edu/workshops/fiscal-procedures-and-management/>

Use the **PURCHASING CARD** Website to find links to policies, forms and references:
<http://vpfa.boisestate.edu/pcard/>

Quick links to
Vendor Contracts,
Policy, and more-

Click any box option
to view additional
detail: Works
Cardholder and
Approver Guides,
forms and
references.

BOISE STATE UNIVERSITY ABOUT ADMISSIONS ACADEMICS RESEARCH ADMINISTRATION GIVING ALUMNI

UNIVERSITY FINANCIAL SERVICES
PURCHASING
P-CARD
ORGANIZATION CHART
CONTACT INFORMATION
VENDOR CONTRACTS
POLICY
STATEMENT OF SHARED VALUES
STANDARDS OF CONDUCT

PURCHASING CARD

What is a P-Card...?
Purchasing Card or P-Card is a Visa card issued by Bank of America for business use. Boise State University is responsible for bill payment; cardholders and departments are held accountable for appropriate card management in accordance with policy.

Now Available! Workshops and Training Materials for Oracle Financials Cloud (OFC)

Lost or Stolen P-Card
Contact Bank of America immediately to report lost, misplaced, or stolen cards. Bank of America Cardholder Call Center (24/7) 1-800-300-3084

For assistance with Bank of America's Works application
Contact Bank of America Technical Help Desk 1-888-589-3473 and Select Option 4 for Works

Questions, concerns?
Contact your department p-card approver for assistance, or the university p-card administrator:
Anna Pollworth
apollwo@boisestate.edu
Phone (208) 426-1795
Fax (208) 426-1152

Contact info is
provided for both
bank and university.

Cardholder Responsibility-Manage your p-card expenditures.

Understand what types of purchases are authorized on p-card. View [Authorized and Unauthorized P-Card Purchases](#) (pdf)

- Check the list of state contract vendors before shopping off contract with online or local vendors.
- Check with OIT Help Desk before purchasing technology equipment or services. HelpDesk@boisestate.edu
- If fund source is a federally funded sponsored project, perform a vendor debarment/exclusions check before proceeding with your purchase. Uniform-Guidance@boisestate.edu

Cardholders are expected to:

- Request sales tax exemption at point of sale, obtain an original detailed receipt for each purchase.
- The cardholder must provide a business purpose for each purchase and in some instances, include supporting documentation to establish that expense is necessary for business (travel, gifts, meals and refreshments, or unusual purchases).
- Reconcile/sign off on your expense weekly in Works (unless you've been assigned a card reconciler).
- Submit required documentation to your department by the required due date.

Some purchases require additional approvals and forms:

- An [Event Expense Summary](#) is required for any non-travel entertainment, event, refreshment, or meal purchase.
- A Travel Authorization is required for most off-campus events or employee or field trip travel.
- Gifts, awards and incentives (promotional items) are regulated. Review [Gifts Awards Incentive policy.pdf](#)

Maintain control of your p-card: Keep your account number secure. Don't leave your card unsecured. Don't include your full account number in email to other staff or vendors as this can expose your account to unauthorized use.

- Don't loan your card or account number to anyone (Only you are authorized to use your card).
- If you can't find your card (lost or stolen), or if you believe your account may be compromised, contact Bank of America immediately at 1-800-300-3084. Notify your approver and the university administrator as well.
- Report any unauthorized charges immediately.

Provide a Business Purpose for Each Purchase

The cardholder provides a receipt which includes purchase detail. In many cases, the purchase detail is also included in Works so reviewers/auditors can see what was purchased but they also need to understand why it was purchased.

- Provide a specific business need for each purchase. Example: *Office supplies for general use. Class supplies for Engr 101.*
- If the purchase is other than standard consumable office/class supplies, include additional detail with your receipt or receipt documentation. Example: Purchases of monitors, cameras, tools, and other electronics or small appliances should include a building and room number or an office or staff member name and planned use.

Business Purpose Example 1:

Cardholder purchases a small refrigerator at Target.com. Business purpose entry in Works: *Fridge for empl break room COE/Room 202*
-This provides an auditor with both business purpose and location. This is a good business purpose entry.

Business Purpose Example 2:

Cardholder purchases a camera at Amazon for \$785. Business purpose entry in Works: *Camera*
-This does not provide a business purpose or location of the camera when not in use-

Suggested business purpose entry in Works: Camera-promotional use at various dept events. Admn Bldg/Rm 1800.

Travel purchases: Before booking travel, review the *Travel Authorization*. It includes the event dates of travel and estimated expense. Airfare and lodging dates should match the travel authorization dates of travel. Amount should be within or close to estimate on travel authorization.

- Provide a Travel Auth number in Works for employee travel or field trips. Include the traveler's name. The business purpose field should provide event name, location and event dates.
- Non-employee travel: Include the traveler's name and provide a reason for travel (job candidate or university guest visit). If it's an event, include the event name, location, and event dates and agenda, invitation supporting travel need.

If a purchase is unusual or may appear questionable, be sure it's business purpose is documented fully. Provide additional detail with the cardholder statement documentation if the business purpose is not clearly defined in Works.

Cardholder Responsibility: Organize & Submit P-card Documentation

Storage and safekeeping of p-card receipts and documentation is the responsibility of the department. P-Card documentation must be maintained by the department for a minimum of five years in a secure location for audit review.

- Cardholders may keep copies for their own records, but the department is expected to maintain documentation and provide it to auditors upon request.

In many areas, p-card documentation and signed statement must be uploaded to a shared drive folder. Please follow the procedure provided by your area for documentation submission.

- Be sure your scanned p-card documentation is legible, in order, and complete. You'll be requested to resubmit documentation if it's not legible and/or not provided in an organized manner.

Why is it important to organize your documentation? P-Card reconcilers, approvers, and managers have to review ALL cardholder expense in your area each month and rely on each cardholder to do their part by organizing their documentation.

From an audit perspective: Audit reviews may be conducted within 5 years of the original purchase. If an auditor can't easily review (or make sense of) p-card documentation, it raises concerns and widens audit focus. Ultimately, it can jeopardize continued participation in the university p-card program for your area.

P-Card accounts may be immediately suspended if sign off or submission of documentation is incomplete, late or considered unacceptable by your area.

Cardholder Responsibility: Resolving and Documenting Non-compliance Issues

Missing Receipts

Receipts are required to authenticate the purchase as business-related. If a receipt is missing, it is the cardholder's responsibility to contact the merchant and ask for a duplicate receipt. Make a note of your attempt and attach it to your statement.

- It's sometimes difficult to obtain receipts for certain types of online payments (conference fees, renewals, student testing services, and other online fees). We can't control the business practices of the merchant, but we can identify what was purchased and why, in order to identify the purchase as a valid business expense.
- If the cardholder can't obtain a duplicate receipt, they must document what was purchased (i.e. include packing slip, packaging, description from vendor website), the business purpose, and include a brief explanation for the missing receipt. *(Use the [P-Card Missing Receipt Affidavit](#))

Repeat incidents of missing receipts from vendors who normally provide receipts should be treated as a serious non-compliance issue as it's an indicator that the cardholder is not taking responsibility for their account.

Sales Tax:

Include a brief explanation with your statement if sales tax is paid unnecessarily.

- If the vendor can't or won't provide sales tax exemption, note it with your card statement documentation.
- If you can easily obtain a refund by calling or emailing the vendor, then do so. However, we don't expect cardholders to spend hours trying to obtain sales tax from a past purchase. If it's a small amount, an acknowledgement from the cardholder that they'll be more careful in the future is acceptable.

Repeated payment of unnecessary sales tax without a reasonable explanation from cardholder should be treated as a serious non-compliance issue as it's an indicator that the cardholder is not taking responsibility for their account.

P-Card Approver Responsibility-

The approver ensures cardholders within their area allocate and sign off on expense in Works and serve as the point of contact for auditors requesting department p-card documentation. The approver is responsible for:

- Editing or flagging transactions requiring allocation correction.
- Ensuring required documentation is submitted on time (receipts, supporting documentation, forms) and that documentation is legible and complete for audit review.
- Providing p-card statements and supporting documentation to the authorizer (manager) for review and signature monthly.
- Notifying cardholder of non-compliance issues.

Other approver duties include:

- Requesting new accounts for employees using the [Cardholder Application](#).
- Assisting department cardholders with account changes using the [P-Card Account Maintenance Request](#). This includes: account closure, card replacement, limit changes, unblock of [Restricted-Merchant-Categories-for-P-Card](#).

Authorization of Expense is managed via signature from Department Head, Director, Dean, VP, or Business Manager on the P-Card Authorization of Expense form (Works report) after expense is reviewed.

- The authorizer has a fiduciary responsibility to ensure expense is in compliance with university policy and serves a legitimate business purpose.
- The authorizer is responsible for ensuring non-compliance issues are resolved or escalated to the university p-card administrator or appropriate official in a timely manner.

Delegation of authorizer signing authority must be approved by the respective dean or V.P. for the area and submitted to the university p-card administrator for review and approval by U.F.S. Department is responsible for maintaining documentation defining authorizer role and/or delegated signature authority in place for their area.

P-Card Non-compliance

Here are some examples of non-compliance issues that may occur on occasion.

- Cardholder sign off not completed online by the required due date.
- Card documentation not submitted by the required due date.
- Incomplete or missing receipt.
- Sales tax paid (for exempt purchase).
- Accidental personal purchase (*Personal use of card requires immediate reimbursement or credit issues by vendor)

Cardholder Responsibility: Provide a brief explanation with your statement which explains what happened and include your attempt to resolve the issue (if possible). Include an expected date of resolution if there is one. Some issues can't be resolved and if that's the case, note it, and make every attempt to avoid future non-compliance issues as you may lose card privileges.

Approver Responsibility:

If the cardholder hasn't provided an adequate explanation or resolution, the approver issues a [P-Card Non-Compliance Warning Form](#) to document the issue (or, an email notification to the cardholder). A copy of the notification should be attached to the cardholder statement so it's clear to auditors that the issue has been addressed.

- Specify action the cardholder needs to take and time frame for correction, if applicable.
- Once the non-compliance issue is identified and documented, the department approver can sign off. Follow-up as necessary if reimbursement or credit is involved.

If the same cardholder has repeat issues with policy compliance, the cardholder should be required to attend a p-card workshop (offered monthly, throughout the year). If the issues escalate, your department may request card suspension or closure.

Non-compliance, continued – Serious Issues

Non-compliance with policy may result in deductions from employee paychecks for unauthorized, illegal, or undocumented purchases; suspension or revocation of card; and personnel action as specified per Fiscal Misconduct Policy 6000 as appropriate based on the violation: <http://policy.boisestate.edu/finance/policy-title-fiscal-misconduct/>

It's considered a serious issue if any of the following applies:

- It involves a significant loss of funds for the department
- It's a deliberate attempt to circumvent policy
- It demonstrates a lack of responsibility by the cardholder

Some non-compliance issues may require management intervention, account suspension or other action. Here's some examples:

- Unauthorized purchase (not approved by your area, not authorized per policy)
- Sharing of account number or card
- Split transaction to avoid bid, card limits
- Intentional use of non-contract vendors when mandated contract is available
- Repeat history of non-compliance issues

The authorizer (manager) for your area is responsible for ensuring non-compliance issues are resolved or action is taken such as mandatory training, card suspension or closure.

Questions or concerns regarding p-card non-compliance issues can be directed to the University P-card Administrator or Purchasing Compliance Specialist.

AUTHORIZED P-CARD PURCHASES

P-Card is intended for small dollar purchases of products and supplies needed during the course of business up to the per transaction limit of your card. **Do not split purchases to bypass limits.**

Some common purchases include:

- Office and class supplies
- Advertising expense (newspaper and other media)
- Books, subscriptions, work-related membership/organizational fees
- Meal and refreshment expense in compliance with university policy
- Most employee business travel and field trip expense is allowed with an approved Travel Authorization. For detail review <http://vpfa.boisestate.edu/pcard/p-card-and-travel/>
- Non-Employee Travel Expense:
 - ✓ University p-card may be used to prepay airfare and lodging (room and tax only, no incidentals) for guests if the individual is volunteering his or her services for the betterment of the University and will not be compensated for services.
 - ✓ University p-card may be used prepay airfare and lodging for job candidates.

UNAUTHORIZED P-CARD PURCHASES

Any purchase not approved by your department, off-contract when state contract exists, split to bypass account limits, or not allowed per university policy is considered unauthorized. Other unauthorized purchases include:

- Alcoholic beverages (not allowed per policy)
- Salaries and wages (not allowed per policy)
- Computers, laptops, notebooks and other personal computing devices (Contact OIT)
- Cellular phones, communication devices, accessories and service related to device (Contact OIT)
- Fuel for personal vehicles (check with Travel Services regarding procedure for vicinity travel)
- Payment to or on behalf of Independent Contractor (Review <http://vpfa.boisestate.edu/accounts-payable/independent-contractors/>)
- Personal expense *including accidental, or partial
 - ✓ Keep p-card separate from personal credit cards

P-Card accounts may be deactivated if used for unauthorized purchases.

Choosing a Vendor- Idaho State Vendor Contracts must be our first choice for university purchases per state code 67-9230.

View the current state contract list @ <https://purchasing.idaho.gov/statewide-contracts/>.

Vendor contracts are listed by category and include contract instructions for each vendor. Use the *Search filter* to locate a contract vendor. Check the *Contract Instructions* for detail.



The screenshot shows a web interface titled "Contract List" with a sub-header "Statewide Contracts". A search bar at the top right contains the text "office supplies". Below the search bar is a table with the following columns: CONTRACT, VENDOR, KEY OFFERINGS, INSTRUCTIONS / DOCUMENTS, EXPIRES, and DOP CONTACT. The table lists three contracts:

CONTRACT	VENDOR	KEY OFFERINGS	INSTRUCTIONS / DOCUMENTS	EXPIRES	DOP CONTACT
Office Supplies PADD15200009	Office Depot Inc.		Office Depot Website Contract Instructions	12/19/2019	Jason Skelton
Office Supplies PADD17200120	Metro Office Solutions		Metro Office Solutions Website Metro Office Request for Account Contract Instructions	12/19/2019	Jason Skelton
Paper (Xerographic)					Jason Skelton

Vendor Contract Advantages:

- Discount pricing on key items
- Delivery directly to your office location, usually within a few days (or less).
- No need to use work or personal time for shopping excursions.
- Eliminates issues with using unknown vendors online who may not be reputable (avoid issues with non-returnable purchases and payment of unnecessary sales tax).

If a contract vendor can't provide the necessary item, or we don't have a contract for the specific item needed, then you can choose an off-contract vendor. Choose a reputable online vendor with delivery to the university. This eliminates the need for employee time spent shopping and picking up items which equates to cost savings.

We cannot choose an off-contract vendor based on pricing. If an item is significantly less costly off-contract, please notify Purchasing: purchasingdepartment@boisestate.edu

**The university purchasing director has authority to grant permission to purchase off-contract in limited situations. Permission must be granted in writing and maintained with department p-card documentation.*

University Amazon Business Account-

Email pcard@boisestate.edu to request an invite to the University Amazon Business platform.

The university *Amazon Business* account provides:

- Free shipping on qualified orders over \$25 ([More detail provided by Amazon Business](#))
- Automatic tax exempt purchasing on items sold by Amazon.com LLC and participating 3rd party sellers
- Business Pricing and quantity discounts on millions of items
- Access to a specialized Amazon Business Customer Service team via phone (866) 486-2360 for assistance with account set up or order issues.

We are required to use state contract vendors as our first choice for purchases.

***Amazon Business is not a state contract but we can utilize it
for items unavailable from a state contract.***

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- ✓ *Cardholders attempting to purchase from a restricted category will receive a 'restricted' message advising use of a mandated state contract as their first choice (or other restriction category).*
 - ✓ *If the item is unavailable from a state contract vendor (or approval obtained in advance) cardholders can proceed with their purchase. Include a brief explanation (i.e. item not available from contract vendor)*
 - ✓ *Restricted purchases reports from Amazon Business will be reviewed monthly to ensure cardholders are utilizing state contracts and following university purchasing procedures.*

Purchases Requiring Additional Approvals And Forms

Meals, Refreshments (or Events) Purchases

Review the meal policy based on fund source for your event. It provides detail on when university funds may be used for meals & refreshments and a per person meal allowance rate (different for each fund source).

[6260 Meals and Refreshments – Local Funds](#) | [6240 Meals Refreshments – Appropriated and Grant Funds](#) | [6250 Public Relations and Alcohol Expenses](#)

- See the meal allowance appendix which specifies amount allowed per meal:
- Complete an [Event Expense Summary](#) for events which includes meals, refreshments or entertainment.

Note: Meals and refreshment purchases are not considered an acceptable use of university funds for informal get-togethers, casual meetings, birthday or holiday parties, or regularly scheduled meetings for staff. Criteria for acceptable meal & refreshment expense is included in policy.

Off-Campus Food Purchases for On-Campus Events

- The dollar threshold for off-campus food purchase for an on-campus event is \$200 per event.
- Review the qualifications regarding event location, food safety, etc. @ <https://eventservices.boisestate.edu/eventguidelines/student-union-event-guidelines/> *(Select Outside Food and Beverage link)

Gifts, Awards and Incentives Purchases (includes promotional items) Review [Gifts Awards Incentives Policy 6230](#)

A monthly gift, award and incentives report is provided to university business managers; a quarterly gift report is provided to university dean's/VP's for review purposes.

- Complete [Gift Award Incentive Form](#) for gifts exceeding \$75 For Employees, or \$250 For Non-employees.

Travel Purchases are regulated by BSU Policy [6180 Travel Policy](#)

- Complete a Travel Authorization before committing funds for employee or field trip travel.
- Review *P-Card and Business Travel* for detail <https://vpfa.boisestate.edu/pcard/p-card-and-travel/>

Purchases Requiring Additional Approvals And Forms, continued

International Vendors and P-Card

Per IRS regulations, certain types of purchases may require tax withholding if purchased from an international vendor which may result in additional cost (tax and penalty) to your department. Typically taxable transactions include software; royalties (i.e. licensing of images, art, text, music, etc.); publishing service; and services performed by foreign vendors in USA (i.e. conference registration fees paid to international vendors for conferences held in USA).

Review *P-Card and International Vendors*: <https://vpfa.boisestate.edu/pcard/international-vendors/>

Questions: contact TaxReporting@boisestate.edu

Information Technology (IT) Purchases

The Office of Information Technologies (OIT) provides IT governance for the campus. Check with OIT HelpDesk (Tel 6-4357 or email HelpDesk@boisestate.edu) before purchasing computers, software, web-based services, cell phones and other IT products & services.

- Computers (including tablets) and network printers can be ordered online: <https://oit.boisestate.edu/hardware/hardware/ordering-computer-equipment/>
 - Software or web-based services require review by OIT's System Architecture Review Board (SARB): <http://oit.boisestate.edu/pmo/sarb/>
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Vendor Agreements & Contracts Require Review by Office of the General Counsel

Online click agreements often "pop-up" with software and other service-related purchases (and with free services as well). These are considered vendor contracts and include terms and conditions (or terms of use) subject to review by the Office of the General Counsel. Submit vendor agreements for review via standard OGC process for contract review.

Office of the General Counsel <https://operations.boisestate.edu/generalcounsel/>

General Information: (208) 426-1203 Contracts: (208) 426-1341

New July 2018: Uniform Guidance Procurement Standards

For detail, review OSP's Uniform Guidance web page: <https://research.boisestate.edu/osp/uniformguidance/>

Uniform Guidance Procurement Standards apply to all purchases with federally funded sponsored project funds.

If a p-card purchase is made with ***federally funded sponsored project funds***, perform a vendor debarment/exclusions check before proceeding with your purchase.

- Go to the USA Government site, *SAM-System for Award Management*: <https://sam.gov/portal/SAM/##11> (You do not need to register to use the **Search Records** option)
- Enter the vendor's name in the **Quick Search** field and select **Search**.
 - If your search returns "**Active Exclusion Records? No**", you can proceed with your purchase.
 - If your search returns result of "**No records found for current search**", you can proceed with your purchase.
 - If the result is **Yes** in the Active Exclusion Records: **STOP-Do not purchase from this vendor**. Find another vendor or contact uniform-guidance@boisestate.edu for assistance in sourcing another vendor.

Document the results of your search and maintain a date-stamped record of your findings with your department p-card or purchasing documentation records in case of audit inquiry.

This is an example of a search result "Active Exclusion Records? No".

This result means you can complete your purchase.

Select the Save PDF or Print option at bottom of page to obtain a date-stamped confirmation.

Questions, concerns: Contact uniform-guidance@boisestate.edu



Entity Registration Summary
Name: FISHER SCIENTIFIC COMPANY L.L.C.
Business Type: Business or Organization
Last Updated By: Justin Sorensen
Registration Status: Active
Activation Date: 12/05/2017
Expiration Date: 12/05/2018

Exclusion Summary
Active Exclusion Records? No

Record Keeping-Department must maintain official documentation in a secure location.

Storage and safekeeping of p-card receipts and documentation is the responsibility of the department. P-Card documentation must be maintained for a minimum of five years in a secure location for audit review. P-Card documentation includes:

- Printed and signed cardholder statement (or card spend report) with receipts and other documentation required by the university, department and/or supporting the business purpose of the purchase.
- Authorization of expense form signed by manager (Department Head, Director, Dean, VP, or Business Manager). Please ensure a printed name and title is provided on the form along with signature.

Departments can opt to retain either scanned or original p-card documentation.

Scanned p-card documentation is an acceptable method of p-card record retention by department. If your area opts to maintain only scanned documentation, adhere to university best practice regarding scanned financial document standards and storage requirements.

- Scanned documentation must be legible and easily retrievable by month/year for view or print access.
- The department is required to maintain p-card documentation in a **secure, centralized** location for 5 years.
 - **Secure** = limited access to authorized staff only (or read-only access to ensure integrity of documentation).
 - **Centralized** = individual cardholders are not maintaining receipts. Cardholders may keep copies for their own records, but the department is expected to maintain documentation and provide it to auditors upon request.

Questions, Concerns Regarding P-Card? Contact:

Pollworth, Anna - P-Card Administrator

Phone: (208) 426-1795

Email: apollwo@boisestate.edu

Kunde, Greg - Procurement Compliance Specialist

Phone: (208) 426-2964

Email: gregorykunde@boisestate.edu

Please email p-card forms directly to Pcard@boisestate.edu to ensure your request is processed promptly.

Report lost/stolen cards directly to: Bank of America Cardholder Call Center (24/7) 1-800-300-3084

Cardholders may contact our card provider directly for assistance completing a card purchase, or to report fraud or suspicious activity regarding their account

Internal Audit and Advisory Services provides audit and control resources for campus.

Explore their site @ <https://internalaudit.boisestate.edu/>