

Purchasing Podium

Informational updates to Purchasing, PCard, and PCard Travel policies & procedures

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Detailed Information, Training, and FAQs is Available Online:

Purchasing

<http://purchasing.uncg.edu>

PCard

<http://purchasing.uncg.edu/pcard>

Travel

<http://purchasing.uncg.edu/travel>

Compliance

<http://bsv.uncg.edu/compliance>

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PCWS Travel Module News

You Spoke, We Listened!

We heard you say you liked the PCard for travel, but the travel module was cumbersome. Hence, **effective March 1, 2008, we have decided to discontinue use of the Travel Module in PCWS and return to the TRV-1 Travel Authorization/Expense Report.** You can find the TRV-1 form online at: <http://fsv.uncg.edu/accounting> and click Forms.

Any future trips already entered into the Travel Module will not go away and can either remain open until the trip has been completed or be closed prior to the completion of the trip by the cardholder or coordinator, at their discretion. Once there are no longer any trips in the module for the cardholder, the travel option will be turned off. PCards without open trips will have the travel option turned off immediately.

Procedures for travel effective 3/1/2008:

NEW TRIPS :

PCard expenses: Original receipt is given to the PCard Coordinator; Coordinator enters an order into the Order Log and notes the PC number on the receipt and reconciles with other, non-travel purchases. A **copy** of the PCard receipt is attached to the TRV-1 form and the expense is referenced on the form by it's PC number in the proper section.

Other (non-PCard) expenses: Original receipt (when required) is attached to the TRV-1 form with the amounts referenced on the form in the proper section. When the trip has been completed, the TRV-1 form with attached receipts and signatures are sent to Accounts Payable's travel office.

For more information on travel policies, go to <http://fsv.uncg.edu/>, click Policies and Procedures, then Travel.

NOTE: Any travel expense made with the PCard is still

subject to review by the PCard Compliance Officer.

EXISTING TRIPS IN TRAVEL MODULE :

If waiting to close the trip once completed: follow the procedures currently in place.

If closing a trip prior to completion: Mark the trip as closed and print off the expense report. Make copies of any PCard receipts for all reconciled PCard travel items and give to the traveler. The traveler must follow the steps for New Trips as previously stated.

All cardholders who have travel privileges on their PCard can continue to use the card for allowable travel related expenses.

Any cardholder who wishes to add travel to their PCard can do so after submitting a PCard Request/Change form, reviewing an online travel training and passing a travel quiz (coming soon). Visit <http://purchasing.uncg.edu/travel> for additional PCard travel information.

Have you been on Spartan Swap lately?

Before entering a requisition or placing an order on your PCard, check the Spartan Swap site to see if someone has the item available for free! There are currently 2 pages of items listed for immediate adoption.

Spartan Swap is not only to list items that you have available, you can put through 'wanted' requests too! Check out Spartan Swap at <http://bsv.uncg.edu>, and click the Spartan Swap logo:



Fiscal Year End Preparation

The end of the fiscal year is closer than we think. Now is the time to purchase furniture and other long lead time (6 to 8 week) items. Be sure to allow Purchasing sufficient time for the bid process!

Additionally, now is the time to start gathering information on purchase orders needing liquidation and send the information to the appropriate buyer via email.