

# Purchasing Podium

Informational updates to Purchasing, PCard, and PCard Compliance 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>

**PCard Compliance**

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

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## UPDATES & INFORMATION

**Maintenance Agreement Reminder**

Please remember that all copier maintenance agreements need to be processed with the requisition to purchase order procedure.

There is a continual need to provide vendors proof of payment/coverage. It is only manageable with one payment method to track.

Your requisition should include the make/model of your copier, it's serial number, location and the period of service coverage.

**New Purchasing Staff**

If you've had anything to do with University insurance in the past three years, you're already familiar with Caroline Morrow. Caroline is still coordinating insurance payments, and now she is also our small purchases (under

\$2500) specialist. If you can't use your PCard for a transaction under that amount, you'll now most likely see her name on your purchase order copy.  
Welcome, Caroline!

**Does your PCard have an expiration date of 11/09?**

If so, your new PCard is now available for pickup at the PCard Office on the 2nd floor of 1100 W. Market Street. Please come by at your convenience to pick up your card, and note the following:

- Rachel (our PCard Specialist) is generally available between 8-5 Monday-Friday, but please call or email before you come by to make sure that someone will be available to give you your card.
- Please bring your UNCG ID or driver's license as proof of identity when picking up your card. Because of this, you are the only person who

can pick up your card - we unfortunately cannot allow anyone to pick up a card issued in another person's name.

- Please be aware that your existing card does not expire until the 30th of this month. You may continue to use it until you have picked up and activated your renewed card.

It's been three years since the cards expiring 11/09 were issued. A lot has happened in those three years! To keep the rules and policies fresh in your mind, we're creating an on line refresher course with a brief quiz at the end. This quiz must be taken successfully by January 29, 2010 to keep your card active.

More details about the training are forthcoming, including a special prize for the first several cardholders to complete the course!

**BANFIN32 UPDATE: HAVE YOU HAD YOUR BANFIN32 RETURNED UPAID TO YOU RECENTLY?**

We have been working closely with Accounts Payable to make sure that departments are using the proper procedures when purchasing goods and services. We thought this would be a good time to provide a refresher on the differences between a BANFIN 32 and a Purchase Order.

The BANFIN32 is a payment voucher, designed to pay a limited number of approved expenditure types which do not require and/or the vendor does not accept a university purchase order, or when the PCard is not accepted by the vendor. These approved types do not require competition and hence can be paid upon receipt.

**Approved Uses for payment on a BANFIN 32**

Entertainment reimbursements	Refunds	Taxes
Postage (only when not available from Spartan Postal)	Legal fees	Hotels/Hotel expenses (i.e. deposits, conferences, etc.)
State/Federal surplus property purchases	Banking fees	Purchases from State Agencies
Physician's charges	Utilities	Worker's Compensation
Unincorporated Individuals	Athletic Travel	

All other purchases of goods and services fall under the umbrella of the Purchasing policies. While it is always important to pay close attention to your departmental budget, it is especially important to do so now. When you process your purchase for goods or services through the Banner Purchasing system, your funds are checked and then encumbered. If you utilize the UNCG PCard, your funds are encumbered the day after the charge is reconciled. Both systems provide Purchasing with the data required for reporting. Please refer to this link for more information: <http://purchasing.uncg.edu/handbook.html>.

If you are unsure about a purchase method, please contact us at the numbers indicated.