

Using the Procurement Card

Cardholders should ensure all purchases made by PCards are approved by department signing authorities prior to making the purchases.

Both cardholders and their supervisors are responsible to ensure the use of PCards is in compliance with the University's Purchasing Policy and Procurement Card Policy.

Placing order

- Cardholders place orders via phone, fax, email or internet and provide PCard information to merchants for payment.
- Copies of the order confirmation, invoice or payment receipt should be kept by the cardholders as the record of the transaction.
- If there is no documentation available during the ordering process, cardholders should request a copy of PCard receipt to be sent with the shipment, and also keep a record of the merchant name, the name of the individual with whom you placed the order and the final amount of the order.
- For orders where goods are shipping from outside of Canada, cardholders should clarify with the merchant who is responsible for customs clearance. If the University is responsible, cardholders should forward a copy of the order and invoice to the Customs Officer for customs clearance.
- Upon receiving the shipment, packing slips, invoices and any other delivery documentation as well as the shipment itself should be checked against the original order for completeness and accuracy.

Misuse of Procurement Card

The following situations are some examples of misuse of the PCard:

- Personal purchases;
- Lend your card to another individual;
- Use of a PCard by a suspended or terminated employee;
- Lack of proper and timely reconciliation of individual cardholder accounts;
- Lack of funds in your departmental or research budget accounts;
- Splitting an order to avoid the single purchase limit;
- Use of a PCard to purchase commodities that have been restricted by policy as described above.

Improper use of the card may result in disciplinary action, up to and including termination of employment.

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