

Purchasing Card Newsletter

FOURTH QUARTER: DECEMBER 2008

Newsletter Available Online Only
Starting 2009

As mentioned in the Third Quarter Newsletter, the Purchasing Card Program is looking for ways to reduce the use of paper where possible. Starting in 2009 we have decided to stop printing the quarterly P-Card Newsletter, which we usually send with the monthly statements.

The Newsletter will continue to be available online at the P-Card website under Newsletter as well as emailed to cardholders and reallocators every quarter.

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Making Changes to P-Card Accounts

To make changes to a cardholder’s account, the best thing to do is fill out the Update form. The purchasing card Update form is available on the Purchasing department website www.purchasing.utah.edu, P-Card, then Forms. Through this form multiple changes can be requested as shown below:

- Add or Remove Chartfield(s)
- Change Cardholder Limits (per purchase and/or cycle limit)
- Cancel Card(s)
- Change Default Chartfield
- Add/Delete Reallocator
- Change Primary Reallocator
- Change Cardholder Information (name/address/phone/email)

There is also an option on the form to fill it out on behalf of multiple cardholders, with the exception of the limit increase which has to be done one cardholder at a time.

Fill out the form online, print, obtain an approval signature, and then fax it to Purchasing at 581-8609.

Reminders

Upcoming Reallocation Cut-off Dates 2009:
Thursday, January 8th
Friday, February 6th
Friday, March 6th

Monthly Cycle Limit
12th to 11th
FAQ’s: Card Cancellations and Document Retention

How do I cancel a purchasing card?

The best way to cancel a purchasing card is to complete an Update form as discussed on side one. We will cancel the card immediately when we receive the Update form. If you want the card cancelled on a specific day, please list that date on the Update form after it is printed. Please destroy the cancelled p-card and throw it away, it does not need to be sent to Purchasing.

What should I do with the documentation of a cancelled p-card?

When a cardholder leaves the University or transfers to another department, they need to leave their p-card documents with their reallocator or another responsible person the department. The documentation will be audited with the rest of the department at the next annual audit even though the cardholder has left.

All documentation needs to be kept for seven years, including documentation for cardholders that have left the department. Once documents have been audited they can be sent to Records Management to be held for those seven years.

Caution: Toner Scam

Please be aware that university departments are once again being targeted by copier toner scammers posing as sales representatives of our state contract suppliers. Do not give out information about the manufacturer or model number of your copier to a person calling your office since they will use this information later to sell you toner at exorbitant prices. Only order from local suppliers and only when you have initiated the call and verified that you are ordering from a reliable source.