

# Use of PCard

Allowable:	Not Allowable:
<ul style="list-style-type: none"> <li>✓ Purchase goods, materials and supplies not exceeding \$3K</li> <li>✓ Pay vendors that do not accept purchase orders as a method of payment or are not set up in SAP not exceeding \$3K</li> </ul> <p><b>General list of allowable category purchases:</b></p> <ul style="list-style-type: none"> <li>✓ Animal Care Supplies</li> <li>✓ Books/Publications</li> <li>✓ Conference/Seminar Registration Fees <i>(NO lodging expenses can be included)</i></li> <li>✓ Courier/Shipping</li> <li>✓ Dues/Professional Memberships</li> <li>✓ Garage Parking <b>only (NOT travel related)</b></li> <li>✓ General Supplies</li> <li>✓ In-Office Meals / Departmental Food <b>only (NOT entertainment related)</b></li> <li>✓ Journal Reprints and Professional Article Submissions</li> <li>✓ Lab Supplies and Equipment (non-capital equipment)</li> <li>✓ Medical Supplies and Equipment (non-capital)</li> <li>✓ Oligos and DNA sequencing</li> <li>✓ Patient Care/Research Study Supplies (must follow grant compliance guidance)</li> <li>✓ Postage</li> <li>✓ Printing/Photocopying/Stationery</li> </ul>	<ul style="list-style-type: none"> <li>☒ Do not use for travel &amp; entertainment related purchases</li> <li>☒ Do not purchase contract items/services</li> <li>☒ Do not pay invoices that have a Purchase Order</li> <li>☒ Do not purchase software licenses that require license agreement or contract to be signed above the single transaction threshold</li> </ul> <p><b>General list of unallowable category purchases:</b></p> <ul style="list-style-type: none"> <li>☒ Advertisements (e.g. job postings, please use the Corporate Card)</li> <li>☒ Alcoholic Beverages</li> <li>☒ Animals</li> <li>☒ Cell Phone /Pre-paid Phone/Phone service plans</li> <li>☒ Computer/laptops/tablets</li> <li>☒ Consultants/Independent Contractors</li> <li>☒ Contract agreements (e.g. software license agreement)</li> <li>☒ Donations/Contributions</li> <li>☒ Equipment Rentals/Repairs</li> <li>☒ Entertainment &amp; Business Meals</li> <li>☒ Gift Cards/Gift Certificates/Gift Vouchers/Cash Advances</li> <li>☒ Non-business purchases (e.g. holiday party favor)</li> <li>☒ PayPal/eBay – please use Baylor’s Approved Vendors</li> <li>☒ Personal bills &amp; expenses (e.g. clothing)</li> <li>☒ Prescription drugs &amp; other controlled substances</li> <li>☒ Public Storage Expenses &amp; Lease/Rentals</li> <li>☒ Travel expenses</li> <li>☒ Tuition School Semester Classes</li> <li>☒ Utilities (exceptions must be approved by COO)</li> <li>☒ Vehicle Rental/Ground Transportation</li> </ul>

**Note:** Exceptions must be approved by Department Head and COO.  
For questions please contact the Card Administrator [cardadmin@bcm.edu](mailto:cardadmin@bcm.edu)

# P-Card Roles and Responsibilities

Roles	DPP Level	Responsibilities include but are not limited to:	High Level Function
<b>1. P-Cardholder</b> (individual authorized to use the issued card, primary account holder of the card)	All	<b>Makes purchases on behalf of the College</b> <ul style="list-style-type: none"> <li>• <b>Review transaction details in Concur</b> and report any discrepancies/unauthorized charges               <ul style="list-style-type: none"> <li>○ Responsible/Accountable for improper charges</li> </ul> </li> <li>• <b>Allocate expenses to appropriate cost center or WBS</b> and submit all required receipts and documentation</li> <li>• <b>Provide appropriate explanation</b> and description of incurred expenses including business justification purpose               <ul style="list-style-type: none"> <li>○ allowable purchases only; exceptions documented with Department Head approval (see Use of P-Card)</li> </ul> </li> <li>• <b>Submit the P-Card Expense Report within 45 days of the actual expenditure</b></li> </ul>	<ul style="list-style-type: none"> <li>• Comply with the P-Card, Purchase of Supplies and Grants Policy and Procedures</li> </ul>
<b>2. Expense Approver</b> (employee's departmental expense approver, org unit approver)	(must be appropriate level - S4 & up)	<b>Approves P-Card Expense Reports in Concur</b> <ul style="list-style-type: none"> <li>• <b>Conduct a thorough review of all expenses</b> to ensure adherence to policy compliance</li> <li>• Ensure that submitted expenses are allowable on the specified funding source and that expenses are properly documented with appropriate receipts and/or documentation based upon the funding source               <ul style="list-style-type: none"> <li>○ all supply expenses</li> <li>○ sponsored agreements</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Verify business justification</li> <li>• Must have P-Card, Purchase of Supplies and Grant Policy and Procedures knowledge as well as price reasonableness determination</li> </ul>
<b>3. Cost Object Approver</b> (budget owner(s) fund center owner in SAP)	SAP COA	<b>Final approver of expense reports in Concur based on WBS/Fund center</b> <ul style="list-style-type: none"> <li>• <b>Secondary check for purchase appropriateness</b></li> <li>• Reviewing budgetary allocations and funds availability</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure regulatory &amp; compliance</li> <li>• Must have P-Card, Purchase of Supplies and Grant Policy and Procedures knowledge as well as price reasonableness determination</li> </ul>
<b>4. P-Card Manager</b> (individual designated by department to monitor department P-Card/s)	(must be appropriate level - M & up)	<b>Ensures department P-Cards are used within Baylor' business expense Policy</b> <ul style="list-style-type: none"> <li>• <b>Using departmental reporting, ensures p-cardholders are submitting P-Card Expense Reports in a timely manner (within 45 days of the actual expenditure)</b></li> <li>• Educate and provide p-card policy guidance to p-card holders in the department</li> <li>• Serves as primary point of contact for p-cardholder questions, concerns or issues (serve as liaison with Central Card Administrator)</li> <li>• <b>Enforces non-compliance consequences under the direction of Department Head and SupplyChain Services</b></li> </ul>	<ul style="list-style-type: none"> <li>• Must have P-Card, Purchase of Supplies and Grant Policy and Procedures knowledge as well as price reasonableness determination</li> </ul>
<b>5. Department Head, Academic Dept. Chair, Center Director, or Non-Academic Chair</b>	M	<b>Ultimately accountable and responsible for P-Card use compliance</b> <ul style="list-style-type: none"> <li>• <b>Provide overall metric and KPI's to the department leadership and administration in order for department to manage accountability</b></li> <li>• In conjunction with Supply Chain Services, <b>cancel P-Cards when one of more or the following items have occurred:</b> <ul style="list-style-type: none"> <li>○ P-Card Expense Reports are not consistently completed</li> <li>○ Three or more P-Card Concur Expense Reports have not been completed</li> <li>○ P-Card has been used for unallowable purchases (e.g., computers, etc.) and are not clearly justified)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Must have P-Card, Purchase of Supplies and Grant Policy and Procedures knowledge as well as price reasonableness determination</li> </ul>

Please visit the BCM Policies and Procedures > <https://intranet.bcm.edu/index.cfm?fuseaction=Policies.Policies&area=03>

03.1.02 – Purchase of Supplies

03.1.11 – Procurement Credit Card Policy

09.1.01 – Grants and Contracts Roles and Responsibilities

Procurement Card Policy Overview and FAQ's