Policy 2.23
Use of a Purchasing Card

Responsible Official: Vice President for Finance/Chief Finance Officer
Administering Division/Department: Procurement Services
Effective Date: July 01, 2013
Last Revision: August 16, 2013

Policy Sections:

I. Overview
II. Applicability
III. Policy Details
IV. Definitions
V. Related Links
VI. Contact Information
VII. Revision History

Overview

To establish the policies and procedures related to the appropriate use of the Emory University Purchasing Card.

Applicability

All employees and students.

Policy Details

The appropriate Chief Business Officer must approve all requests to obtain a new Purchasing Card.

The Cardholder must successfully complete required training, and, upon completion of training, sign and accept the terms and conditions of the Purchasing Card Cardholder Agreement prior to receiving his/her Purchasing Card. Cardholders must also complete a bi-annual refresher training course in order to retain use of their Purchasing Cards.

All Purchasing Card transactions must be processed in accordance with University Procurement and Payment finance policies and the authorized buying method instructions listed in the Emory Marketplace.

The standard Purchasing Card monthly spend limit is $5,000.00. The standard single transaction limit is $1,499.00. Requests to increase the standard spend or transaction limit must include an explanation of the business purpose for the request and must be approved by the appropriate Senior Business Officer. The request must then be forwarded to the Financial Operations’ designee for final review and approval.

The Purchasing Card cannot be used for purchases of restricted commodities and/or purchases from restricted suppliers.

All Purchasing Card transactions must be made by the individual to whom the Purchasing Card is issued.

All Purchasing Card transactions must be made for the sole use and benefit of the Emory University. Personal
purchases are not permitted under any circumstances as per the terms and conditions of the Cardholder Agreement.

As an authorized agent of the University, it is the cardholder’s responsibility to ensure proper use of the University’s sales tax exemption number.

It is the cardholder’s responsibility to ensure appropriate supporting documentation for each Purchasing Card transaction is uploaded into the PaymentNet system.

It is the Authorized Approver’s responsibility to review and approve each transaction in the PaymentNet system.

Procurement Services is authorized to review Purchasing Card purchasing activity to ensure compliance with this policy. Procurement Services is authorized to suspend the Purchasing Card privileges of any Cardholder who is deemed to be in violation of this policy.

Violation of this policy and/or the duties and responsibilities listed in the Purchasing Card Training program will result in further action by the Dean, Director, or appropriate Chief Business Officer in accordance with the Emory University Human Resources policies.

Fraudulent use of the Purchasing Card will result in actions being taken in accordance with the procedures established in the Cardholder Agreement form.

Definitions

Purchasing Card/P-Card - an Emory University-issued credit card that may be one of two types: a standard P-Card with replenishing credit limits or a CVC (Controlled Value Card) with an assigned value that requires approval for replenishment.

Authorized Approver - either the immediate supervisor of the cardholder or designee of the cardholder’s Business Officer.

Related Links

- Current Version of This Policy: http://policies.emory.edu/2.23

Contact Information

<table>
<thead>
<tr>
<th>Subject</th>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement &amp; Payment Services</td>
<td>Customer Service</td>
<td>404.727.5400</td>
<td><a href="mailto:e-market@emory.edu">e-market@emory.edu</a></td>
</tr>
<tr>
<td>Purchasing Card Administrator</td>
<td>Denise Hadley</td>
<td>404.727.0252</td>
<td><a href="mailto:dhadley@emory.edu">dhadley@emory.edu</a></td>
</tr>
</tbody>
</table>

Revision History

- Version Published on: Jun 24, 2013 *(Updated to proper links)*
- Version Published on: Jun 24, 2013
- Version Published on: Jan 09, 2013
- Version Published on: May 04, 2012
- Version Published on: Dec 10, 2010
- Version Published on: Jan 12, 2010
- Version Published on: Oct 20, 2009
Emory University policies are subject to change at any time. If you are reading this policy in paper or PDF format, you are strongly encouraged to visit policies.emory.edu to ensure that you are relying on the current version.