



P-Card Newsletter

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Please direct any p-card questions, problems or concerns to Rita Cardarelli @ 2-4855 or e-mail Rita rita.cardarelli@bc.edu

Best Practices for P-card: Use Contracted/Preferred Vendors

In order to save as much as possible, BC's Contracted/Preferred vendors should be used whenever possible. This provides the University with savings in transactional costs as well as pricing. Please review our website at: www.bc.edu/procurement to obtain Contracted/Preferred vendor information.

P-card Lab Offered for P-1's and P-2's

Great News! Click on to the Procurement Webpage to get updated P-card information: www.bc.edu/offices/buy/pcard/PcardLabP2s.html. In this new lab you can learn everything about p-card and Peoplesoft including:

- 1) Creating a new chartstring for a new p-card
- 2) Creating and deactivating cards
- 3) Reports in BC Custom and p-card queries
- 4) Checking and interpreting the p-card budget
- 5) Reconciliation and Level III data



Eagle Print Services: Under New Management

Eagle Print Services is the on-campus preferred copy and print shop located in the basement of Carney Hall, Room 024. All Eagle Print purchases are charged to the p-card for added University savings. Be sure to contact Eagle Print for all of your copy and print needs at x 2-3418.

Deactivating Unused P-cards

With the start of the new academic year, P-2's are advised to check your department's active p-card list on Peoplesoft especially for any p-cards that may need to be deactivated. Vacated positions, temporary help who have moved to different departments and graduated work-study students may have p-cards that need to be deactivated. Remember, open p-cards may be susceptible to fraud.

Level 1, 2 and 3 Vendors

In this information age, a vendor who accepts p-card has a choice to be a Level 1, 2 or 3 merchant. Here is a breakdown of the different levels:

Level 1: This level is the most common, especially for local, small businesses. The information provided to US Bank is the date, supplier, and dollar amount.

Level 2: Suppliers have the ability to pass sales tax information as well as a transaction data field (which allows up to 16 characters). Some vendors pass this data to the cardholder statement. Level 2 data can be helpful to the cardholder in reconciling charges, especially in the case of repetitive charges. Examples: order # or a grant #.

Level 3: The merchant provides all of the data in Level 1 and 2 plus line-item data which include: product code, description, quantity, unit of measure, price and tax. This is the optimum level a merchant can provide Boston College. **To encourage the use of Level 3 vendors BC does not require receipts for transactions under \$1000 from contracted Level 3 merchants such as WB Mason, Dell Computer, CDW and Federal Express.** For a complete listing of Level 3 vendors, please log onto: http://www.bc.edu/offices/buy/pcard/Pcard_Receipt.html

What's NOT Allowed on P-card?



PROFESSIONAL SERVICES



CONSTRUCTION



TRAVEL



ENTERTAINMENT



Before calling Procurement with your P-card decline, please confirm funding is available.

Please check with your P-2 (the budget administrator) first when a decline happens. The number one reason why p-cards decline is budget money running low. Many people call Procurement to find out why their p-card declined. When we go into the budget details under commitment control, the balance is usually less than the decline. A budget transfer can be made immediately, generating an e-mail to US Bank. If the transfer is completed by 3 pm, the money is usually available by 10 am on the next business day.

Please keep in mind; any outstanding purchases do not appear in Peoplesoft for at least 2-3 business days.

Approved charges (or pending transactions) that have not appeared in Peoplesoft can be seen in Access-online in the *transaction detail* section. If you believe your card still should be working, please contact Rita @ 2-4855.

Ask Celia: P-card advice or questions. Please address your questions to pcard@bc.edu

Charge Not Appearing on Peoplesoft

**Dear Celia,
I purchased a printer that arrived over two weeks ago and it still hasn't appeared on Peoplesoft. When does it supposed to appear? Our funding is ending soon and I'm in a panic.**

Loretta

Dear Loretta,
I'm glad you asked. It's important to check your budget on a regular basis to make sure charges appear on a timely basis, especially if funding is coming to an end due to fiscal year end or a grant ending. There are two reasons why a charge has not yet appeared in Peoplesoft. 1) The charge has come in through Peoplesoft but has gone into the wrong chart string. This usually happens if an incorrect p-card was used against a special program so you may want to check your other programs. 2) More than likely, the vendor has not charged your p-card yet. This is common with large companies such as Dell. Sometimes they will send out

a product and bill later depending on their credit card reconciliation procedures. I suggest calling the vendor and tell them to enter the charge ASAP.

P-card Arrival after Application

**Dear Celia,
I am the P-2 and I did an application on Peoplesoft for a new card in my name over three weeks ago, and have not received notice yet. It's a brand new project and we're waiting to buy. When will my card be here?**

Meghan

Dear Meghan,
You're smart for checking. New P-cards can take up to 2 weeks but after that you need to contact us to follow-up. I checked Peoplesoft and could not find your application under your department ID #. If you tried to create a card for yourself, when you went to save it, you should have received an error message. The system does not allow you to submit your own p-card application. This is a security measure installed to protect you as well as BC. Here is the error code you should have received from Peoplesoft:

`You are not allowed to update your own data.`

You need to go back to your P-1 or another P-2 in your department in order to do the application. If no one else can do it, your supervisor can e-mail Rita permission to do the application at rita.cardarelli@bc.edu.

No-Tax Status and P-Card

**Dear Celia,
I use my p-card at Kinko's and they charged me tax. Doesn't BC have a non-tax status? Bill**

Hi Bill,
This is just an example of why you should be using BC Contracted vendors such as Eagle Print. The contracted vendors recommended by Procurement already have BC's tax-exempt certificates. We should not be paying taxes for products purchased for BC. If you must use a vendor who does not have this information, the vendor may obtain a tax exempt certificate on our website at: www.bc.edu/tax. The vendor needs to enter their information on the form provided and the certificate will be available for printing.

