

FAQ's

Procurement Card Program

How does a Procurement Card work?

To the purchaser, the Procurement Card is just like an ordinary credit card. The card may be used for local, phone, or internet purchases within established dollar limits and other appropriate limits.

How is the monthly billing and departmental chargeback handled?

On a monthly (cycle) basis, cardholders must log on to the SDOL (Smart Data OnLine) site of JPMorgan Chase to input accounting information to be uploaded into Banner. Receipts are affixed to a printed report of the charges and forwarded to Michelle Kirkpatrick, CM21, after the supervisor reviews and approves.

When will I see card charges apply to my department's budget?

Our cycle closes around the 25th of the month. Approximately ten days following the end of the billing cycle, if all cardholders have submitted documentation for their charges, your charges will be posted and viewable in Banner.

What are the goals/benefits of a Procurement Card program?

- Reduced costs for small dollar purchases
- Ease of acquisition for departments (no purchase order)
- Streamlined online procedures replacing paper purchase orders
- Reduce petty cash reimbursements and out-of-pocket expenses
- Employee empowerment in purchasing goods
- Easier interactions with web-based suppliers
- Consolidated billing for the Business Office

What are some examples of appropriate uses of my card?

- Office Supplies
- Tools/hardware
- Repair parts
- Dues and subscriptions
- Professional memberships
- Conference registrations
- Books
- Equipment (under \$2500 per item)

What are the dollar limits on my card?

The standard limits on RHIT cards are \$1000 for each purchase and \$5000 for the month (cycle). In addition, you are limited to 3 purchases per day and 10 purchases per month (cycle). Some users request different limits on their applications. Once approved, these limits replace the standard ones. A cardholder can [verify his limits on SDOL](#). If you have questions about your limits, contact your [Card Administrator](#).

What if I need my limits changed?

With appropriate approvals, your limits may be raised (or lowered). There is a [card limit form](#) available for this purpose. If the changes are needed immediately in order to make a purchase, call Bob Watson, the program administrator.

Why would I want lower dollar limits?

Unused credit on your card represents potential liability to your department and to RHIT if your card should be lost or stolen. It just makes sense to have reasonable limits on your card that will allow you to make necessary purchases, but minimize your department's exposure.

What categories of purchases are prohibited?

- Items for personal use
- Cash advances
- Travel and entertainment items, including airline tickets, hotels, motels, car rentals, gasoline, entertainment, and meals
- Research animals and products
- Radioactive, chemicals, reagents, drugs, or biological materials
- Items or services requiring that a contract be signed
- Consulting Services
- Alcoholic beverages
- Purchases of individual items of \$2500 and over
- International purchases

Other prohibited transactions include exceeding credit line limits, and 'splitting' a purchase to override card limits.

Who can obtain a card?

Employees of the Institute (faculty, staff, or paid graduate student) may be issued a card with the approval of their department. Temporary employees and students are not eligible for a card.

When I apply for a card, will my personal credit history be checked?

No. Transactions are between the Institute and the bank. They have no bearing on any employee's credit history.

What do I do if my card is lost or stolen?

Call JPMorgan Chase immediately, at 1-800-316-6056. After this call, contact Bob Watson, your card administrator, at 812-877-8488 to provide details and obtain a replacement card.

How do I dispute a charge on my account?

If you don't recognize a charge, or don't believe it should be on your billing, you can contact JPMorgan Chase and also file your dispute in writing. Click [here](#) for complete information.

How long does it take to obtain a card or replacement?

Once departmental approval has been received, it takes about ten days to receive a card.

When do cycles begin and end?

Cycles begin on the 26th of the month, or the next business day. Cycles end on the 25th of the month.

A vendor says my card was declined. What do I do?

Your first step should be to call Bob Watson, the program administrator, at 877-8488. He will find the reason for the denial and make arrangements for the purchase if card limits have been exceeded. If he is not available, you can call JPMorgan Chase directly, at 1-800-316-6056. You will be asked to identify yourself with the Social Security number from your application, or another security question. You will need to provide the amount of the sale, the date, and the merchant's name. The customer service rep can tell you why your charges were denied, but cannot adjust card limits without administrator approval.

I lost one of my receipts. What should I do?

For an internet purchase, you may be able to review your account history and obtain a duplicate receipt. Otherwise, you will need to contact the vendor for a replacement.

I was charged sales tax. What should I do?

The cardholder should contact the vendor, identify the transaction, and request that the tax be credited back to the card. It is the responsibility of the cardholder to inform the merchant that the Institute is tax exempt at the time of purchase. The vendor may request a [tax-exempt certificate](#).

I am transferring between departments. What do I do with my card?

You may retain your current card, but the cardholder is responsible for contacting Administrative Services and advising them of the change. Your new department head will have to authorize you to retain the card.

I am leaving the Institute. What do I do with my card?

You should notify the card administrator of the change in your employment status as soon as possible. Your card should be cut up and taken to ADS. HR may also collect your card as part of your exit process.

Can students obtain a purchasing card?

Students may not have a card issued in their name. Cards are only issued to employees.

Who will support the cycle reporting when the cardholder is on vacation?

The cardholder should make these arrangements within his department. Departments are encouraged to have a second cardholder (coworker or supervisor) cross-train on all needed functions (approval and report printing) for vacation and illness coverage. Under no circumstances should SDOL passwords be shared. Each individual should have his/her own login ID.

What training is available?

The ADS website offers a [PowerPoint presentation](#) that takes cardholders through all the steps of the process for monthly reconciliation. Additionally, printable, step-by-step, detailed instructions are available online for the monthly process for [cardholders](#), [supervisors](#), and [report printing](#).