

UNIVERSITY OF NORTH★TEXAS™

Purchasing Card Program Guide Purchasing and Payment Services

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1. OVERVIEW

Purchasing Card Program

The University of North Texas Purchasing & Payment Services (PPS) is pleased to offer to all University of North Texas (UNT) Departments/Divisions a program that simplifies the way in which you may order and pay for approved goods and services. The Purchasing Card program is a fast, flexible purchasing method for processing delegated orders from suppliers that accept credit cards. The purpose of the Purchasing Card Program is to establish a more efficient, cost-effective method of purchasing and payment for delegated dollar transactions. If used to its potential, the program will result in a significant reduction in the data entry of small orders, receiving, invoices and a reduction in related processing. The Purchasing Card can be used to purchase approved goods and services with any supplier that accepts MasterCard as a form of payment.

The Purchasing Card program is designed to delegate the authority and capability to purchase limited items directly to the person to whom it most matters – YOU, the user. The Purchasing Card will enable you to purchase under your delegated authority non-restricted commodities directly from the vendors without the issuance of a requisition and a purchase order.

Purchasing Card Contract

The terms and conditions of the Purchasing Card contract were specified and awarded by the Texas Building and Procurement Commission for the State of Texas. UNT is utilizing the State of Texas contract for Purchasing Card services with JP Morgan Chase. UNT will comply with the terms and conditions of the state contract in the management of this program.

Purchasing Card Program Guide

This Purchasing Card Program Guide provides the guidelines for using the Purchasing Card. Please read it carefully. Your signature on the Cardholder Purchasing Card Agreement shows that you understand the intent of the program and agree to follow the established guidelines.

Important Points of the Program

The following important points should be reviewed before using the Purchasing Card:

- Your Purchasing Card is issued in your name. All purchases made on the Purchasing Card must be for university business only. You are responsible for the security of the Purchasing Card and the transactions made with it. **If you do not follow guidelines when using the Purchasing Card, you could receive disciplinary action, including termination of employment.**
- The Purchasing Card is **not for personal use**. The cards are labeled with the State of Texas seal to clearly identify them. Additionally, protective sleeves are provided for card storage to assist in identifying the card from your personal debit/credit cards. **Personal use of the purchasing card is always considered a major work-rule violation and the employee will be subject to disciplinary action, up to and including termination and possible criminal prosecution.**

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- You can use the Purchasing Card to purchase approved goods and services at any vendor that accepts MasterCard and **is not on the restricted vendor list**. It may be used for in-store, mail, telephone, fax orders, or internet purchases. Internet purchases must be made on secured sites only. Normally, when browsing the web, the URLs (web page addresses) begin with the letters "http". However, over a secure connection the address displayed should begin with "https" - note the "s" at the end. A "lock" icon is also shown in the lower right or left of the web browser window.
- You may use the Purchasing Card to purchase approved goods and services within your delegated limits.
- Use must not exceed the monthly credit limit assigned to the Purchasing Card.
- Recording of DeptID/ProjID, account numbers, and description of items purchased must be entered into SmartData by the cardholder and/or the Reconciler.
- Reconciliation of the account summary received from JP Morgan Chase through SmartData to ensure all charges are accurate is required for each billing cycle. The reconciliation needs to be completed within seven (7) days of the dates for reconciliation published on the PPS website (pps.unt.edu) and/or upon email notification from the Purchasing Card Administrator.
- The Purchasing Card **is not intended to avoid or bypass established purchasing or payment policy or procedures**. This program compliments the existing policy and procedures available. Please refer to the Purchasing Guide found on the PPS website for additional detail.
- Each department that utilizes the purchasing card program must designate a Department PCard Reconciler to have access to SmartData Online. This access is for confirmation of card purchases and DeptID/ProjID charges. Account summaries are downloaded and printed from this online system. The Department may authorize cardholder's access to SmartData for entry purposes, or they may designate only the Reconciler for SmartData entry.
- All cardholders and Department PCard Reconcilers must attend initial training and complete annual online refresher training to understand the use of the card and the guidelines to be followed.
- All Department/Division PCard Managers (DeptID/ProjID Holders) must attend initial training and complete annual online refresher training to understand the review and approval process and the management responsibilities of the Purchasing Card Program.

2. GENERAL OVERVIEW

2.1 Duties and Responsibilities

2.1.1 Purchasing Card Customer Service

The Purchasing Card Customer Service was designated by UNT for questions and issues regarding the program. Customer Service staff is knowledgeable on all procedures in the Purchasing Card Program Guide.

**UNT Purchasing Card Customer Service:
940-369-8031**

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2.1.2 Purchasing Card Administrator

The Purchasing Card Administrator is charged with maintaining documentation for the Purchasing Card activities within UNT. The administrator is knowledgeable about the program, the guidelines and related forms. Cardholders should first contact the Purchasing Card Customer Service, who will answer questions in regards to the program or potential problems. Purchasing Card Customer Service may refer questions to the Purchasing Card Administrator when necessary.

**UNT Purchasing Card Administrator:
940-565-3204**

2.1.3 Department/Division PCard Manager (DeptID/ProjID Holder)

The Department/Division PCard Manager (DeptID/ProjID Holder) is responsible for designating cardholders and approving monthly Purchasing Card summaries of cardholders to ensure all purchases are within university policy. There is not an official process for signature proxy for Pcard transactions – departments should contact the Pcard Administrator for guidance in the event of need. The Department/Division PCard Manager may also assist in assigning cardholder limits and regulations. The Department/Division PCard Manager is responsible for designating Department PCard Reconcilers and/or cardholders to have access to SmartData Online to reallocate required transactions to their appropriate DeptID/ProjID.

The Department/Division PCard Manager should review the usage of the purchasing cards and cancel cards based on non-usage to limit the liability of the university. The review should be done at least twice a year.

The Department/Division PCard Manager is responsible for attending initial training and completing annual online refresher training to understand the review and approval process and the management responsibilities of the Purchasing Card Program.

2.1.4 Cardholder

The individual designated by the Department/Division PCard Manager to utilize the Purchasing Card by purchasing small dollar supplies and/or services is the cardholder. The cardholder is responsible for following the purchasing guidelines of UNT in regards to purchases, selection of vendors, security of card, maintaining documentation, and monthly reconciliation of invoices to account summary.

The cardholder is responsible for attending initial training before obtaining the card and for completing annual online refresher training on card guidelines. Additional software training is required for all cardholders that have been designated as SmartData users.

2.1.5 Department PCard Reconcilers (Reconciler)

Each department must establish one or more employees designated as reconcilers who are responsible for the accounting processes of the departmental cards. These personnel must attend initial cardholder training to learn guidelines and instructions provided to cardholders. They must also attend software training to be able to reallocate charges to accounts and change account codes, as well as, complete online annual refresher training on card guidelines. Department PCard Reconcilers may also be cardholders, but they may not be the reconciler of their own card.

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2.1.6 JP Morgan Chase Customer Service

The Purchasing Card program is serviced using a team approach with JP Morgan Chase Customer Service Center. This center is available 24 hours a day, 7 days a week to assist **the cardholder** with general questions about the Purchasing Card account. If a Purchasing Card is lost or stolen, Customer Service should be notified immediately. The number is located on the back of the card and on the information sheet that accompanies the card. **The Customer Service number is: 1-800-890-0669.**

SmartData Online

SmartData Online is a web-based program for the Purchasing Card. This program allows the Cardholders and/or the Reconcilers to view transactions as they are posted to all accounts that are in their line of authority and reallocate purchases to different account numbers and account codes. It also allows users to run various reports that will help in reconciling the account summary.

SmartData Online allows the user to monitor the purchases that are being made; the purchase is available for viewing and changes as soon as the vendor submits the transaction to JP Morgan Chase, usually within two or three days of the purchase. This allows for more control over the use of the Purchasing Card.

2.2 Purchasing Card Controls

2.2.1 Credit Limits

All Purchasing Cards have the default monthly cardholder spending limits set at \$2,000 per transaction with a \$10,000 billing cycle limit. Exceptions (increases or decreases) from the default limits should be addressed to the Purchasing Card Administrator in writing or via e-mail by the Department/Division PCard Manager. The Purchasing Card Administrator will provide the appropriate exception request form for completion.

If the request is approved, the Purchasing Card Administrator will process the change with JP Morgan Chase and notify the Department/Division PCard Manager. Approval includes processing through the Director of Purchasing and the Senior Director of Purchasing and Payment Services. **Please allow 5 working days to process any changes.**

All approved requests will be reviewed by the Purchasing Card Administrator and the Director of Purchasing to insure the increased credit limits remain necessary.

2.2.2 Transaction Limits

Your Purchasing Card has a single transaction limit (which is the delegated purchase limit). This is the amount available on the Purchasing Card for a single purchase. A transaction includes the purchase price plus tax (for purchases made outside of Texas), freight, and installation. Cardholders should not attempt to make a purchase greater than his/her approved amount. Changes to the transaction limit must be handled by the Purchasing Card Administrator. Your transaction limit is established by your Department/Division PCard Manager and the Purchasing Card Administrator and is included on your cardholder agreement form.

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2.2.3 Restricted Vendors

The following vendor types have been designated as restricted vendors. Purchases with these vendors are unauthorized:

- Airlines
- Airports
- Auto Rentals
- Auto & Truck dealers – sales
- Bars, taverns, nightclubs
- Boat dealers
- Boat rentals
- Duty free stores
- Hotels
- Marinas
- Motorcycle dealers
- Motor home dealers
- Package stores, beer, wine, liquor
- Personal service providers – laundry, barbers, funeral services, dating services, health spas, etc.
- Professional services & membership organizations – doctors, hospitals, schools
- Railroads
- Recreational and utility trailers, camper dealers
- Service providers – financial institutions, insurance, lodging, campgrounds
- Cruise lines
- Transportation services
- Travel agents

Each vendor establishes their own merchant category classification (MCC) directly with JP Morgan Chase. This classification is a method of preventing purchases from “high risk” merchants (i.e.: bars, taverns, casinos, pawn shops, escort services, health & beauty spas, etc.). Restrictions to UNT cards are put in place by MCC classifications. Depending on how the vendor is established with JP Morgan Chase, your card could be declined. An example would be if a restaurant is established with JP Morgan Chase as a bar or tavern, your purchase would be declined even though you refer to the restaurant as an authorized vendor.

2.2.4 Inactivity of Purchasing Card

Purchasing cards with no activity (no recorded purchases) for more than 6 months will be subject to card termination with consultation of the Department/Division Director who authorized the card. Purchasing cards with no activity for 12 months will be automatically terminated by the Purchasing Card Administrator. Cardholders, Department PCard Reconcilers and Department/Division PCard Managers will be notified of the cancellations.

2.3 Sales and Use Tax

UNT, as an agency of the State of Texas, is tax exempt and the credit card identifies UNT as being tax exempt within the State of Texas. All purchase documents should be reviewed promptly to ensure that sales tax is not charged.

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2.4 Security of the Purchasing Card

The cardholder is responsible for the security of the card and it should remain in their possession. This card should be treated with the same level of care as the cardholder would use with his/her own personal charge cards. Guard the Purchasing Card account number carefully. It should not be posted in a work area or left in a conspicuous place. It should be kept in an accessible, but secure location that other employees cannot access. A card protector/sleeve is provided for additional assistance in identifying the purchasing card as a business use only card and to keep separate from your personal credit cards.

The card is to be used for business purposes only. UNT has established sanctions related to unauthorized use of the Purchasing Card.

2.5 Employee Separation/Termination/Leave of Absence

Prior to transfer to another department, cardholders must surrender their Purchasing Card to Purchasing and Payment Services. The Department/Division PCard Manager and/or the Department PCard Reconciler should ensure that the cardholder returns the purchasing card to the Purchasing Card Administrator or a designated representative in Purchasing and Payment Services. A new card application may be submitted under the direction of the new Department/Division PCard Manager if appropriate.

Prior to leaving the university, cardholders must surrender their Purchasing Card to Purchasing and Payment Services. The Department/Division PCard Manager and/or the Department PCard Reconciler should ensure that the cardholder is directed to return the purchasing card to Purchasing and Payment Services during their exit from employment.

The Purchasing Card Administrator will terminate card privileges upon notice of separation from the Human Resources Department if the cardholder has not submitted their card to Purchasing and Payment Services.

Department/Division Pcard Managers must notify the Purchasing Card Administrator if a Pcard cardholder is on any type of leave of absence, excluding sick leave or vacation. The Purchasing Card Administrator will suspend the card privileges during the leave period.

2.6 Lost or Stolen Cards

If a Purchasing Card is lost or stolen, immediately contact JP Morgan Chase Customer Service at **1-800-890-0669**. After contacting JP Morgan Chase, notify the Purchasing Card Administrator and the Department Manager via email.

Prompt, immediate action can reduce our liability of fraudulent activity. It is imperative that you contact the JP Morgan Chase immediately for suspension of your card because UNT and you, the cardholder, are responsible for all charges made on the card until it has been cancelled.

3. PROCEDURES

3.1 Obtaining a Purchasing Card

3.1.1 To obtain a Purchasing Card, the following process should be followed:

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- 3.1.1.1 Obtain a Cardholder Application/Approval form by selecting “PCard Forms” from the PCard menu tab at PPS’ website <http://pps.unt.edu/>. This application will provide Purchasing and Payment Services with necessary information about you (the cardholder), the appropriate account/support account for default payment, and the Department Manager’s approval of your application and subsequent designation of your delegated purchasing authority within the procedure of UNT.
- 3.1.1.2 Submit a completed and signed application/approval form to the Purchasing Card Administrator in Purchasing and Payment Services.
- 3.1.1.3 The Purchasing Card Administrator will request issuance of the Purchasing Card from JP Morgan Chase within 1 week of receipt of all required documentation. (Actual issuance from JP Morgan Chase will be within 2 to 3 weeks.)
- 3.1.1.4 Upon receipt of your card by the Purchasing Card Administrator, applicants will be instructed to register for Purchasing Card Training through the PPS website. **Applicants must bring a photo I.D. to the training class for verification and identification.**
- 3.1.1.5 **Applicant attends training class (approximately 2 hours) and signs Cardholder Purchasing Card Agreement.**
- 3.1.2 The following items should be provided to you, the cardholder, during training:
 - 3.1.2.1 Cardholder Purchasing Card Agreement: This is an agreement between the cardholder and UNT which affirms that the cardholder has read and understands the policy and procedures for the Purchasing Card. A copy of the agreement will be provided to the cardholder at the end of the training session.
 - 3.1.2.2 Purchasing Card Program Guide: This document outlines UNT’s procedures in regard to the Purchasing Card. It also outlines some approved types of purchases.
 - 3.1.2.3 Purchasing Card Account Summary example: This document will provide an example of the complete account summary as it should be printed at the end of the billing cycle for signatures.
 - 3.1.2.4 Statement of Disputed Items Form: The cardholder should use this form if they are disputing a transaction that appears on their Cardholder Statement.
 - 3.1.2.5 Purchasing Card: Upon signing the Cardholder Purchasing Card Agreement and proper identification and verification, the card will be issued and signed in the presence of the Purchasing Card Administrator or other Purchasing Card staff.

3.2 About the Card

A Purchasing Card will be in your name with the State of Texas seal and the wording “For Official Use Only” clearly indicated on the card. **This card is for University business purposes only and may not be used for any personal transactions.**

It is important that you understand that you are personally responsible and accountable for this Purchasing Card.

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Note:

- The single transaction limit for the cards is listed on your cardholder agreement. A copy of the agreement will be provided to you after initial training.
- Charges can be reallocated to multiple DeptID/ProjIDs and account codes for budget reasons.

3.3 Purchasing Card Activation

The cardholder must activate the Purchasing Card before using it by calling the JP Morgan Chase phone number provided on the card.

3.4 Purchasing Guidelines

3.4.1 General Information

All purchases must be in accordance with the laws of the State of Texas and the purchasing policies of the UNT System and UNT. The cardholder is responsible for compliance and strict adherence to all purchasing guidelines within their departmental delegated authority.

Individual card limits are at the discretion of the Department/Division PCard Manager with approval from the Director of Purchasing and Senior Director of Purchasing and Payment Services.

The departmental delegated authority is for small purchases. State law mandates that large purchases may not be broken down into small purchases to meet delegated limits. To do so would be a violation of state law and UNT policy.

Cardholders should promote and encourage positive interactions with suppliers. Honesty and courtesy are essential ingredients in all aspects of a buyer/supplier relationship.

All cardholders should follow these guidelines when using the Purchasing Card:

3.4.1.1 Determine if the transaction is an acceptable use of the card, and if it is within the cardholder's spending limit.

3.4.1.2 HUB vendor activity

UNT is committed to a good faith effort to increase the number and value of business transactions with Historically Underutilized Business firms consistent with the State's functional goal to build a solid foundation for economic prosperity. You should compare pricing among several vendors, including HUB vendors, to obtain the best value for your department and the university. Contact Purchasing and Payment Services for any assistance needed with identifying HUB vendors that provide the goods and/or services you want to purchase. HUB information is also available on the PPS website at pps.unt.edu.

3.4.1.3 Purchases over \$500.00 require the verification of the vendor's status with the State of Texas. To complete the verification, the cardholder must identify the vendor and verify that vendor is in good standing with the state on Franchise & Sales tax by visiting <https://cpafmprd.cpa.state.tx.us/tpis/search.html>.

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The State of Texas requires that this verification be **completed prior to any purchase, but no earlier than 7 days prior to the purchase.** Cardholders must confirm the vendor status was verified through the designation on the monthly account summary report.

- 3.4.1.4 Call, fax, use the vendor's website or visit the vendor to place your order.
- 3.4.1.5 Confirm pricing and freight.
- 3.4.1.6 Request that a hard copy of the invoice with the pricing, and freight be faxed to the cardholder and/or included in the shipment of supplies or print order confirmation page from their website.
- 3.4.1.7 Ask the supplier if a purchase order number is required. If a supplier requests a purchase order number, use a combination of your initials and DeptID/ProjID.; e.g. John Doe, DeptID/ProjID #12345 would be purchase order number JD-12345.
- 3.4.1.8 Shipped purchases should be directed to the Cardholder at the Departmental address.
- 3.4.1.9 If delivery is to be made to Central Receiving, request that the supplier indicate your name and the words "Purchasing Card" on all packing lists and box labels. This will enable the receiving department to facilitate delivery of your supplies.
- 3.4.1.10 Cardholders are responsible for completing the Controlled Item Code Equipment Form for qualified purchases and submitting them to Purchasing and Payment Services within 5 days of purchase. Purchasing and Payment Services will ensure the appropriate tag is placed on the purchased controlled item. University policy requires the following assets to be controlled by asset tag in addition to all items costing \$5000 or more.

Controlled and Tracked Property Codes:

Property
Tracked Regardless of cost: Computers (<i>includes total price of CPU</i>), monitor, keyboard, and mouse bought at the same time; Laptops
Items costing \$500 to \$4,999: Data Projectors
Stereo Systems
Cameras (<i>including digital cameras</i>)
DVD players/recorders, laser disk players, TVs, VCRs and camcorders
Printers

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3.4.2 Examples of Acceptable Purchases:

All purchases must be made in accordance with the applicable statutes and regulations, the State Comptroller's rules, UNT System policy and UNT program guidelines. The billing cycle generally runs from the 6th of one month to the 5th of the next month. Payment of each billing cycle is 30 days. Vendors should only charge the account when goods are shipped. Back orders should not be charged until the goods are shipped.

The Purchasing Card may be used for many various purchases such as:

- Books and film
- Clickwrap agreements that are on the authorized listing maintained by PPS
- Computer hardware and/or software¹
- Food or non-alcoholic beverages for official university business meetings on campus²
- Janitorial supplies
- Medical supplies
- Office supplies
- Registration fees
- Equipment Rentals³
- Research supplies
- Small office equipment
- Subscriptions
- Tools/Hardware
- Services that do not involve any type of signed agreement

The purchases must be within the cardholder transaction limits. Purchases of multiple computers should be processed through a requisition and not split between several transactions. Refer to the appropriate account coding for controlled assets.

² Refer to UNT Policy 2.1.6 for food purchases. The justification form for the food or beverage purchase must be completed and retained with the account summary for each purchase. The form will be reviewed during routine reviews. No state funds can be used to purchase food or beverages.

³ Short-term rentals where no signed agreement is required are the only acceptable purchases.

3.4.3 Unacceptable Purchases (unless an exception has been authorized for you in writing by the Purchasing Card Administrator on or after May 1, 2010):

- Any single purchase exceeding card limits (including freight)
- Advertisements
- Alcoholic beverages
- Ammunition
- Animals
- Capital equipment
- Cash advances
- Cell phones/iPhones/pda's¹
- Clickwrap agreements that have not been reviewed or authorized by PPS
- Consulting or professional services
- Controlled substances or prescription drugs
- Cylinder gases
- Dues
- Entertainment
- Fabrications of equipment
- Food from restaurants as a dine in service; food from restaurants is acceptable as a take-out for official university business meetings on campus²
- Flowers³
- Gasoline/Fuels

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- Gifts³, Gift cards and/or certificates³
- Hazardous chemicals or materials with a NFPA ≥ 3 . Note: if there is no NFPA or other information that can be presented to Risk Management Services (RMS) to show a chemical's toxicity, flammability, and reactivity; then, the chemical must be considered hazardous.
- HEAF funded purchases
- Insurance of any type
- Internet provider services⁴
- Items (plaques, trophies, shirts, etc) that include UNT branding/logo
- Maintenance agreements
- Memberships (state and/or local funds)⁵
- PDA's
- Personal items
- Plants³
- Postage
- Prepaid telephone cards
- Printing services (printing must first be reviewed by UNT Printing services and declared to be acceptable to be printed elsewhere)
- Prizes and awards³
- Promotional items (defined as any product designed to make UNT more widely known or is used to promote the UNT name)
- Prospective employee travel
- Purchases involving equipment trade-ins
- Radioactive materials
- T-shirts that include any logo or branding (ALL logos must first be approved by URCM and must go through the requisition process)
- Telephone services and equipment
- Temporary personnel
- Tips or gratuity from a state or local account. All tips/gratuity must be paid from gift accounts only.
- Toll Road Tags
- Travel and related expenses
- Tuition and fees
- Used equipment
- Utilities
- Weapons (guns and rifles)

Refer to UNT Policy 2.8.5 for cell phones and PDA's.

² Refer to UNT Policy 2.1.6 for food purchases.

³ Refer to UNT Policy 2.1.13 for gift purchases.

⁴ Refer to UNT Policy 2.0.2 for broadband and internet connection allowance.

⁵ Membership to Sam's Club is an allowable purchase on local funds.

3.5 Receiving Supplies

Most purchases of goods should be picked up by the department or delivered to the department by the vendor. If it must go through UNT Central Receiving, request that the supplier indicate the cardholder's name, department, campus location, phone number, and the words "Purchasing Card Program" on the shipping instructions and/or receipt. Instruct the vendor not to send the invoice/receipt to Purchasing and Payment Services. It should be sent directly to the individual cardholder to avoid duplicate payment.

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It is your responsibility for ensuring receipt of goods and follow-up with vendors to resolve any delivery problems, discrepancies and/or damaged goods. A copy of the charge slip, sales receipt or any other information related to the purchase must be retained and stored with all purchase card documentation for that billing cycle.

Invoices with no amount due are the most optimal documentation since they itemize the purchase. A vendor's entry system usually prints an automatic invoice with the processed order. Instruct the vendor not to send the invoice to Purchasing and Payment Services, but directly to the individual cardholder making the purchase (this will prevent duplicate payments to vendors). If a purchase is made via mail or telephone, ask the vendor to fax the receipt and/or include the receipt with the goods when shipping the product.

3.6 Purchasing Card Account Summary, Documentation, Reconciliation and Approval

The cardholder/department is responsible for maintaining appropriate transaction descriptions, responsible DeptID/ProjID info, and account codes directly in SmartData for each transaction. This information shall be entered and/or confirmed as soon as possible after the data appears in SmartData, but not later than the date posted by Purchasing and Payment Services for the billing cycle journal entry date. Default DeptID/ProjID and account codes will be automatically populated in SmartData. Cardholders and reconcilers will make any needed changes to those items and record other required information about the transaction to include use of the authorized category codes only (See Attachment E for the authorized listing) . See Section 3.10 (Posting Charges to DeptID/ProjID) for information regarding the use of HEAF funds (Higher Education Assistance Funds) with the purchasing card.

Always obtain an itemized invoice/receipt when using the Purchasing Card. It is every cardholder's responsibility to ensure there is an itemized invoice for each purchase. All receipts/invoices should be kept for readiness of reconciliation and maintenance of documentation. Screen prints are acceptable for internet orders and order forms for fax/mail orders *if* a receipt/invoice is not provided by the vendor. All invoices/receipts, including screen prints must contain the price of the item.

At the end of each billing cycle, the Department Reconciler will go online and make final changes to required data and download and print an account summary for each cardholder. The account summary lists all purchases made to that account. Transactions from grant monies will be downloaded to a separate account summary for additional routing to the ProjID holder for signature.

Within 7 days of printing the summary, the cardholder should reconcile their receipts with the account summary. (Receipts for purchases not included on the current billing cycle should be stored for the next billing cycle.) The cardholder should verify all purchases as valid, ensure all documentation is attached to the account summary with any additional notes needed for explanation, sign the summary sheet, and forward the package to the Reconciler for further review and signature.

Account summaries for grant accounts must be routed to the appropriate ProjID holder for signature and then retained by the Department (do not route to Research Services). Research Services will obtain ProjID information directly from the Purchasing Card Administrator. Research Services will communicate with the Departments regarding unallowable charges and supply the Purchasing Card Administrator with a different Dept or ProjID.

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The Reconciler will review the transaction summary and make any necessary corrections, sign the summary, and forward to the Department/Division Manager for signature approval. All transactions should be reviewed for possible fraudulent activity. Any possible fraudulent activity should be reported to the Office of Internal Audit.

The Reconciler can make any needed changes in SmartData and finalize purchases at this time. This final review in SmartData locks any further changes from being made to the transactions by the cardholder. The Reconciler can match the transactions to the activity posted to the DeptID/ProjID once the detail is posted to the Departmental Budget Summary available online at my.unt.edu. Discrepancies should be reported to Financial Reporting.

The Department/Division Manager will review all information and sign the summary page, indicating approval of the transactions. There is no proxy procedure for Pcard signatures – please contact the Pcard Administrator for guidance if an event requires such proxy. All transactions should be reviewed for possible fraudulent activity. Any possible fraudulent activity should be reported to the Office of Internal Audit.

The Department is responsible for maintaining all purchasing card documentation, including the signed account summaries, receipts, and/or other transaction documentation. Documents must be retained for a period of 5 fiscal years plus the current year according to current university policy for record retention.

UNT has established sanctions related to non-compliance.

3.7 Fraud Indicators

3.7.1 During the reconciliation of the account summary, the Reconciler and Department/Division PCard Manager should be aware of potential fraudulent transactions. The fraud indicators below should be considered during the reconciliation process.

- Unusual vendor names
- Same vendor address and employee address
- One employee continues to purchase from a specific vendor
- Unusual activity for a cardholder
- Repeated misuse by cardholder
- Round number purchases
- Transactions with missing receipts or altered documentation
- Sequential or unnumbered receipts
- Duplicate charges
- Purchases made outside of normal department business hours
- Activity by non-cardholders or terminated employees
- Cardholder approving his or her own transactions

3.8 Review of Purchasing Card

The Purchasing Card account summary along with the supporting documentation become the official records and should be maintained by the using department for 5 fiscal years plus the current fiscal year according to current UNT Record Retention Schedule. Routine reviews will be conducted by various Purchasing and Payment Services staff and/or Internal Audit throughout the year. The reviews will include requests for documentation to be delivered to Purchasing and Payment Services and/or reviewed on site at the department. Notification will be sent to the cardholder, the Department Reconcilers and the Department/Division Manager at least 3 days prior to the scheduled review.

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3.9 Statement and Payment

JP Morgan Chase will mail a summary billing to Purchasing and Payment Services, listing all transactions during the period by cardholder.

PPS will pay the summary billing in full and will charge the default account set for each card, unless such default had been previously changed by the Department Reconciler. The payment cycle is set up to be on the **5th** of each month. Payment is required within thirty (30) days to JP Morgan Chase.

3.10 Posting Charges to DeptID/ProjID

Purchasing and Payment Services will obtain the monthly transactions from all Purchasing Cards that includes any updates to the DeptID/ProjID or account codes directly from SmartData Online for journal entry. The data will be used to process the charges against the selected or default DeptID/ProjID and those debits will appear on the Department Budget Summary.

Expenditures from HEAF funds are not allowed on the purchasing card. HEAF funds (68XXX, 84XXX) cannot be used as the default DeptID for purchasing card transactions.

3.11 Purchasing Card Payment

Employees do not pay their own monthly statement. The program does not affect personal credit ratings in any way. The Purchasing Card program carries corporate and individual liability.

3.12 Returns, Credits, Rebates, and Disputed Charges

Should a problem arise with a purchased item or charge, every attempt should be made to first resolve the issue directly with the supplier. Review of future summaries is vital to ensure the account is properly credited for returns, credits and disputed charges. The returned, credited or disputed item should be followed through by the cardholder to ensure accurate correction is made to the account. Documentation for each return, credit, rebate, and/or disputed charge should be maintained with the appropriate account summary for the billing cycle.

- Returns: If a cardholder needs to return an item to a supplier, contact the supplier and obtain instructions for return. Note that some suppliers may charge a restocking or handling fee for returns. Cash should never be accepted by the cardholder for any returns. All returns should be handled through a credit to the purchasing card.
- Credits: If an item is accepted as a return by the supplier, a credit for this item should appear on the following month's billing cycle. Credits for Texas sales taxes paid should always be requested immediately and should be credited the month following the original receipt. Sales tax paid with purchases made in other states is not always refunded, but should be investigated.

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- **Rebates:** If an item purchased has a rebate, ensure the vendor makes the check payable to the University of North Texas. The rebate check should be directed to the Accountant I in Disbursements or the Director of Payments in PPS with reference to a purchasing card rebate. An email should be sent to the Purchasing Card Administrator with details regarding the purchase, the department and the DeptID/ProjID information to ensure that the reduction of expense is to the appropriate DeptID/ProjID.
- **Disputed Charges:** If a cardholder finds a discrepancy on a monthly account summary, the cardholder should contact the supplier and attempt to resolve the problem directly. A copy of the form and letters should be kept as documentation.

If a cardholder cannot resolve a disputed item directly with the vendor, the cardholder should complete the Statement of Disputed Item Form and forward it to JP Morgan Chase. JP Morgan Chase will place the charge in a "Statement of Dispute" and the account may be given a provisional credit until receipt of adequate documentation from the vendor. If the documentation appears to be in order, the transaction will be re-posted to the account and the dispute considered closed. If the charge is suspected to be fraudulent, the card will be immediately blocked, continue to have a provisional credit (if given) and in investigation of the charge will continue. A new card will then be re-issued to the cardholder, if appropriate. If the charge appears legitimate, the transaction will then post to the new account.

Please remember that PPS is your partner in this venture and is willing to assist with any dispute resolution.

3.13 Failure to Comply with Program Guidelines (Sanctions)

Sanctions provide an approved framework to address program violations. Non-adherence to these guidelines will result in a notification of infraction, revocation of individual cardholder privileges or permanent revocation of the card. Serious infractions could result in disciplinary action, criminal charges, and/or a combination of all. The Purchasing Card must never be used to purchase items for personal use or for non-University purposes even if the Cardholder intends to reimburse the university. Personal use of the purchasing card will result in permanent revocation of cardholder privileges.

Should an employee know of fraudulent use of a purchasing card, they should report such to the Office of Internal Audit.

Examples of failure to comply with program guidelines include but are not limited to the following:

- Failure to properly secure the University Purchasing Card from theft or unauthorized use
- Failure to maintain monthly account summary and documents
- Incomplete documentation: inclusion of erroneous information, missing information such as signatures, DeptID/ProjID numbers, proper description of purchase, etc.
- Failure to maintain separate account summaries for grant transactions
- Failure to obtain necessary approval for grant purchases
- Purchasing from a restricted vendor or purchase of a restricted item without authorization from the Purchasing Card Administrator
- Failure to complete Controlled Item Equipment Form for qualified purchases and submitting to Purchasing and Payment Services
- Providing your card or card number to another employee to use
- "Splitting" of purchases to circumvent purchasing card limits
- "Splitting" of purchases to circumvent required bidding requirements
- Loss of the purchasing card
- Failure to provide requested documentation to Purchasing and Payment Services or Internal Audit

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Depending on the nature of the infraction, the following sanctions will be enforced:

1. Notification of Infraction
An email notification outlining infraction(s) will be sent to the cardholder, Department/Division Manager, Department Reconciler, Dean, Vice-President, and UNT Internal Audit, as appropriate. The cardholder will be required to make changes to become compliant and a follow-up review will be completed by Purchasing and Payment Services within 90 days. Future infractions of the same nature will result in more severe sanctions.
2. Temporary Suspension of Card
Cardholder privileges will be suspended for up to thirty (30) days. Reinstatement of the cardholder privileges will occur upon successful completion of a scheduled Purchasing Card Training session, with a written plan of compliance submitted to and approved by the Purchasing Card Administrator that outlines measures to correct infractions and the end of the suspension period. A follow-up review will be completed by Purchasing and Payment Services within 90 days. Future infractions of the same nature will result in more severe sanctions.
3. Long-Term Suspension of Card
Cardholder privileges will be suspended for six (6) months. Reinstatement of the cardholder privileges will occur upon successful completion of a scheduled Purchasing Card Training session, with a written plan of compliance submitted to and approved by the Purchasing Card Administrator that outlines measures to correct infractions and the end of the suspension period. Future infractions of the same nature will result in permanent revocation of card.
4. Permanent Revocation of Card
The purchasing card will be cancelled and the cardholder will no longer be eligible to obtain a purchasing card through the university.

All alleged infractions will be thoroughly reviewed by Purchasing and Payment Services. Additional information will be requested from the individual cardholders and/or the affected departments prior to any enforcement of sanctions. All enforcement of sanctions will be reported to the Office of Internal Audit and the Vice-President or Provost responsible for that department/division.

3.14 Departmental Failures

Departmental failure to maintain account summaries and documentation, complete the monthly reconciliation process, or other similar departmental infractions could result in **suspension** of all cards for the department. Suspension will occur only when such failure is repeated and will not occur with the first departmental infraction. The suspension will be authorized by the Purchasing Card Administrator after consultation with the Director of Purchasing. Suspension will be revoked upon retraining of the Department/Division Manager, Cardholders and Reconcilers, and with a written plan of compliance submitted to and approved by the Purchasing Card Administrator that outlines measures to correct failures.

3.15 Personal use of the Purchasing Card

Personal use of the Purchasing Card is always considered a major work-rule violation and the employee will be subject to disciplinary action, including termination and possible criminal prosecution. Any personal purchase will result in permanent revocation of the purchasing card for the cardholder.

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FREQUENTLY ASKED QUESTIONS AND ANSWERS

In what ways do I benefit from using the Purchasing Card?

When you use the Purchasing Card, you enjoy reduced paperwork, quick and efficient order processing, faster delivery, no prompt payment interest, no more phone calls from the vendors asking where their money is and the ability to monitor purchases online throughout the month.

How does UNT benefit from the Purchasing Card Program?

When employees use the Purchasing Card, UNT enjoys greater productivity as a result of reduced paperwork and savings from consolidated multiple supplier invoices to one statement from JP Morgan Chase.

What should I do if my Purchasing Card is lost or stolen?

You should call 1-800-890-0669 immediately to report the Purchasing Card missing and request a replacement. Then call the Purchasing Card Administrator at 940-565-3204 and your department manager to advise that you have called JP Morgan Chase.

What do I do if a purchase is denied?

Your purchase may have exceeded a spending or transaction limit, UNT excluded that type of merchant or the vendor is not equipped to accept MasterCard as payment. Please Contact JP Morgan Chase at 1-800-890-0669 to determine the reason for the denial.

Is it possible for someone else to use my card?

No. According to the Cardholder Agreement that you signed, you are responsible for all charges and the safekeeping of the card.

Will use of the Purchasing Card affect my credit report?

No. The Purchasing Card is a corporate liability card and carries no personal credit liability for cardholders who use the Purchasing Card.

Whom should I contact to resolve an error or dispute concerning my account?

You should first contact the supplier. Most exceptions or issues can be resolved between you and the supplier. If you cannot resolve an issue with the supplier, complete the Dispute Form (available on our website) and fax the form to JP Morgan Chase.

When I use my Purchasing Card to make a purchase, how is the transaction authorized?

The supplier verifies the account number with JP Morgan Chase when you use the Purchasing Card to make a purchase. Your spending limits are checked automatically against preset UNT limits.

What about UNT being tax exempt?

The card is identified as a "State of Texas" official business, tax-exempt card. You should advise the supplier (at the time of order or check out) that the purchase is to be tax exempt. UNT is exempt from paying sales tax on business meals when we are direct billed. Payments made by the purchasing card are considered direct bills. If ordering by phone or the internet, the vendor must be told that we are tax exempt. A tax exempt form can be faxed to the vendor, if requested.

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Can employees have multiple cards?

No. No one is authorized to have more than one card.

My department had an exception for certain purchases. Can we continue to purchase those items?

No. All exceptions are repealed as of September 1, 2007. Division/Department Managers must request exceptions through the Purchasing Card Administrator. The Administrator will provide the appropriate form for the written request and it will be forwarded to the Director of Purchasing and Senior Director of Purchasing and Payment Services for review.

Are approved exceptions for increased transaction limits and certain purchases permanent?

No. All approved exceptions will be reviewed annually to insure they remain necessary.

Are purchases allowed through PayPal?

PayPal purchases are allowed for purchasing approved goods. Cardholders must insure that online purchases are completed through a secure website and must obtain a payment receipt that indicates the vendor received payment. Transfer of funds to an individual is not allowed.

My DeptID Manager will be away from the office during the required account summary review – how does the department utilize signature proxy during this time?

There is not signature proxy for Pcard purchases. Please contact the Pcard Administrator for appropriate guidance.

What is the definition of a promotional item?

Any item used for marketing the UNT organization – whether to make the name more widely known or successful.

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UNIVERSITY OF NORTH★TEXAS™

Purchasing Card Agreement Cardholder

I hereby acknowledge receipt of a University of North Texas MasterCard Purchasing Card. As a cardholder, I agree to comply with The University of North Texas Purchasing Card Guidelines.

I agree to use this card for University of North Texas approved purchases only and agree not to charge personal purchases. I understand that the University of North Texas will review the use of this card and report any discrepancies.

I understand that the card is property of the University of North Texas. I further understand that the University may terminate my right to use this card at any time for any reason. I agree to return the card to the University of North Texas PPS Customer Service Department immediately upon request, my transfer to another department, or upon termination of employment.

Card Number: XXXX-XXXX- -

Cardholder:

Employee I.D.:

Department:

Default Dept ID:

Transaction Limit:

Monthly Limit:

Signature: _____

Date: _____

JPMorganChase

Dispute Form:

This form has been provided for your convenience. If you believe that a transaction on your statement is in error you can use this form to contact us. Regulations require that you notify us in writing within 60 days from the statement billing date of the disputed charge. Any response received after this time frame may result in our inability to assist you with your dispute. **Please be advised that Visa & MasterCard require that attempts be made to resolve your dispute with the merchant before notifying us.** Please complete and mail or fax this form to Commercial Card Services, ATTN: Dispute Dept., P.O. Box 2015, Elgin, Illinois, 60121-2015, CCS-Disputes@Chase.com, or Fax to **(847) 931-8861**.

Name: _____
Account #: _____
Merchant Name: _____
Transaction Date: _____
Posting Date: _____
Reference #: _____
Transaction Amount: \$ _____

Please Circle one of the following choices applicable to your dispute. Include all necessary information/documentation.

1. I do not recognize the above-mentioned charge. I have attempted to contact the merchant to obtain further information.
2. I have been billed more than once by the same merchant. I authorized one charge with this merchant only. My card was in my possession at the time of the transaction.

Valid Charge \$ _____ Reference # _____ Transaction Date: _____
Invalid Charge \$ _____ Reference # _____ Transaction Date: _____

3. I canceled: Service / Airline Ticket / Hotel Reservation on _____(date). Cancellation# _____
4. I have not received the merchandise that was to be shipped to me on _____(date). I have requested credit.
5. Merchandise that was shipped to me arrived damaged or not as described. I returned it on _____(date) and asked the merchant to credit my account. I am providing a copy of my returned mail receipt.
6. Merchant was to issue credit for merchandise I returned to the store. I have enclosed a copy of my credit receipt.
7. I have been charged for a purchase that was paid for by other means. I am providing a copy of the documentation showing the other method of payment.
8. I have been billed for an incorrect amount. My receipt shows \$ _____, however, I was billed \$ _____ I am providing a copy of my receipt showing the correct amount.
9. I did not authorize the above-mentioned charge. I have attempted to contact the merchant to resolve dispute.(If this is a VISA account, Visa regulations require that your account be closed prior to pursuing this dispute reason. Please call Customer Service at 800-316-6056 to assist you in closing your account.)
10. Other: I am attaching detailed information that describes the dispute.

Work Phone () _____ Email: _____

Fax _____

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Attachment C – Duties and Responsibilities

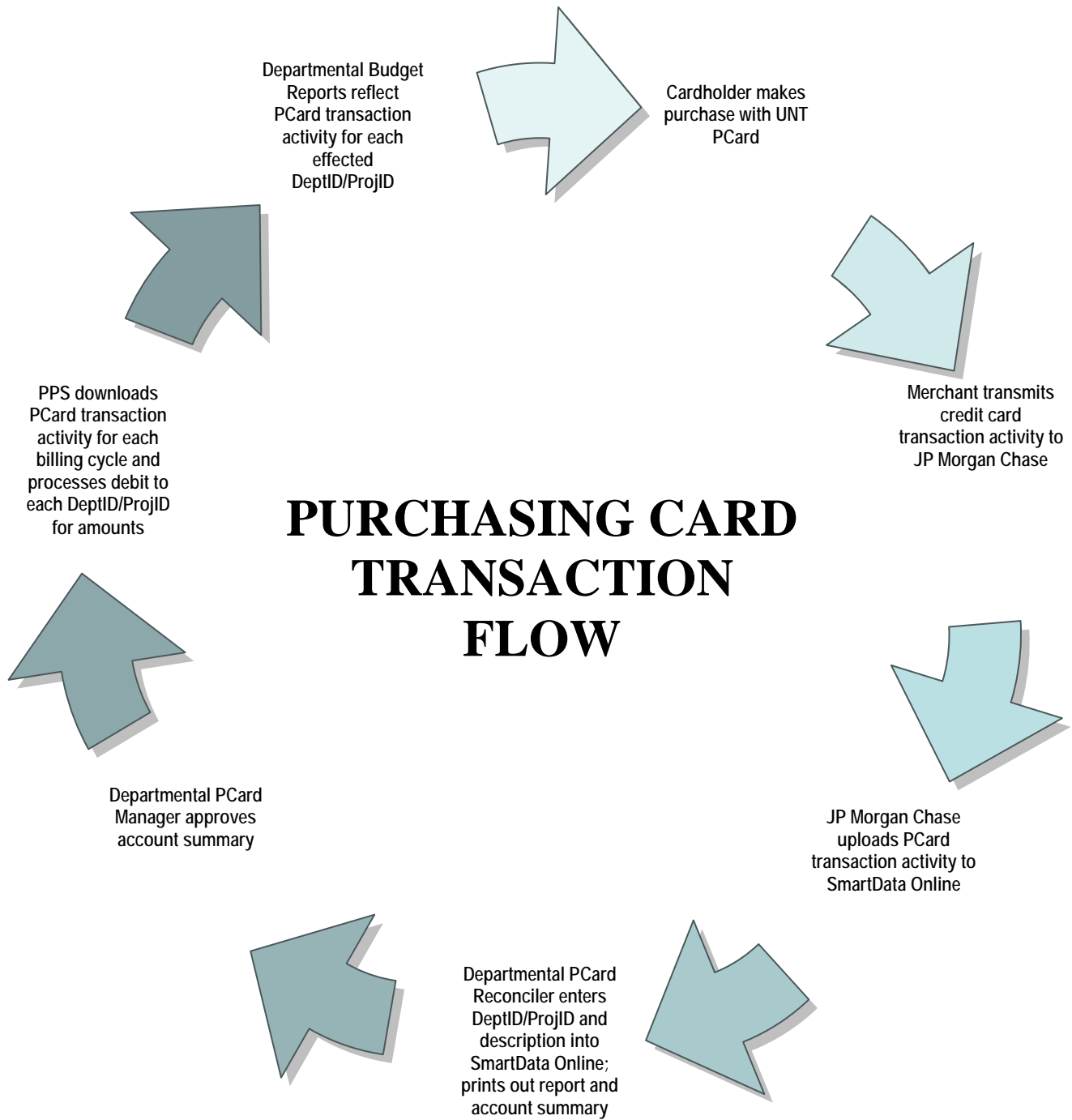
Cardholder	Department PCard Reconciler	Division/Department PCard Manager (DeptID/ProjID Holder)	Purchasing Card Administrator
Attends initial cardholder training to learn guidelines and procedures. Signs cardholder agreement. Completes annual online refresher training.	Attends cardholder training to learn guidelines and instructions provided to cardholders. Signs reconciler agreement. Attends software training to be able to reallocate charges to specific DeptIDs/ProjIDs and change account codes. Completes annual online refresher training.	Attends initial training to understand the review and approval process and the management responsibilities of the Purchasing Card Program. Signs manager agreement. Completes annual online refresher training.	Maintains documentation for the Purchasing Card Program within UNT.
Purchases small dollar supplies and/or services that are authorized as acceptable purchases. Knows those items considered unacceptable purchases and ensures that those items are not purchased. Determines if the transaction is an acceptable use of the card and if it is within spending limit.	Responsible for the accounting processes of the departmental cards.	Designates cardholders and signs initial request/application for purchasing cards.	Performs routine reviews of random purchasing card transactions and recommends sanctions to Director of Purchasing.
Responsible for selection of vendors, including the comparison of the pricing offered by various vendors to promote the use of HUB vendors.	Review the cardholder's package and make any necessary corrections, sign the summary, and forward to the Department/Division PCard Manager	Designates Department PCard Reconcilers to have access to SmartData Online.	Monitors purchasing transactions for fraudulent activity and reports issues to UNT Internal Audit and Director of Purchasing.
Identifies the vendor and verifies that vendor is in good standing with the state on Franchise & Sales tax by visiting http://ecpa.cpa.state.tx.us/vendor/tpsearch1.html .	Download and print an account summary for each cardholder if the cardholder has not already completed this.	Ensures all purchases are within university policy.	Provides necessary training to all Purchasing Card cardholders, Department PCard Reconcilers and Department/Division PCard Managers.
Obtains an itemized invoice/receipt for every purchase.	Processes online adjustments to DeptID/ProjIDs, account codes, and enters a description of items purchased, if the cardholder has not already completed this.	Assists in requesting appropriate cardholder limits.	Downloads monthly activity from SmartData Online and processes appropriate transactions to charge DeptIDs/ProjIDs.
Responsible for the security of Purchasing Card.	Monitors purchasing transactions for fraudulent activity.	Approves monthly Purchasing Card summaries of cardholders by signing	

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Cardholder	Department PCard Reconciler	Division/Department PCard Manager (DeptID/ProjID Holder)	Purchasing Card Administrator
		the monthly billing summary.	
Completes monthly reconciliation of invoices to account summary. Signs the summary sheet and forwards the package to the Department PCard Reconciler for further review and signature.		Reviews the usage of the purchasing cards and cancels cards based on non-usage. Matches and reconciles transactions to Departmental Budget Summary report.	
Ensures all documentation is maintained by the department for a period of 5 fiscal years plus the current fiscal year.		Monitors purchasing transactions for fraudulent activity. Ensures terminating employees return Purchasing Card to Purchasing and Payment Services.	
Uses a detailed description of the approved goods or services purchased to designate the purchase as an authorized one.		Ensures terminating employees return Purchasing Card to Purchasing and Payment Services.	
Returns Purchasing Card to Purchasing and Payment Services upon transfer to another department.	Provides documentation to Purchasing and Payment Services and/or UNT Internal Audit upon request.	Ensures all documentation is maintained by the department for a period of 5 fiscal years plus the current fiscal year.	
Returns Purchasing Card to Purchasing and Payment Services upon termination/separation from employment.		Provides documentation to Purchasing and Payment Services and/or UNT Internal Audit upon request.	
Reports lost or stolen cards immediately to JP Morgan Chase Customer Service at 1-800-890-0669 .			
Retains copy of cardholder agreement for easy reference to transaction limits.			
Ensures all documentation is maintained by the department for a period of 5 fiscal years plus the current fiscal year.			
Provides documentation to Purchasing and Payment Services and/or UNT Internal Audit upon request.			

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Attachment D – Transaction Flow Chart



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Attachment E – Authorized General Description Category Codes

Use the following major categories when completing the *Description of Items Purchased* field on SmartData Online. Add the additional clarifier, then a detailed description. A maximum of 40 characters can be entered into this field.

For example: Bandages for a first aid kit: "Supplies-Medical-Band-Aids for First Aid Kit."
 Virus Software Upgrade: "Computers-Software-Virus Protection."

MAJOR CATEGORY	ADDITIONAL CLARIFIER
BOOKS	
CLOTHING	Uniforms Boots
COMPUTERS	Accessories Hardware Maintenance Supplies Software
CREDIT	Description
DISPUTED TRANSACTION	
EQUIPMENT	
FOOD	Description & Purpose - The benefit to the University is still required on the Food Form
FOREIGN CURRENCY MARKUP	
FURNITURE	Description
REGISTRATION FOR	Employee's Name
SERVICE	Type of Service Purchased
SHIPPING	USPS, UPS, DH (BACK) :express
SUBSCRIPTIONS	Newspaper, Magazine, Other

SUPPLIES	Art Electrical Janitorial Kitchen Lab Maintenance Medical Music Office Plumbing Shop Science Tools
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Attachment F – Clickwrap Agreements

Clickwrap Agreements effective September 1, 2008

PPS recognizes and understands departments may benefit from making free and/or low dollar purchases from internet vendors with department PCards, especially for software programs or service subscriptions. In an effort to allow these purchases to be made with PCards, PPS has evaluated the business risks associated with making purchases from several common vendors and is now authorizing departments to make PCard purchases with the vendors on the attached listing.

All Departments are responsible for reading and understanding the full terms and conditions associated with any purchase made with University dollars, as well as for complying with the policies regarding PCard usage. The attached listing of vendors includes those terms and conditions PPS has identified as being particularly important for departments to understand prior to moving forward with a purchase from each vendor.

PPS will continue to add approved vendors, as appropriate. We will also review continued use of the vendors each March, August, and November. Please check for approved vendors with each individual purchase.

http://pps.unt.edu/index.php?option=com_content&task=view&id=266&Itemid=351

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