NEW PROCUREMENT CARD POLICY

FIN-PURCH-07: Procurement Card Program Policy

• Establishes standards, internal controls, and safeguards related to the P-Card and Meeting Card programs
• Describes reconciliation procedures
• Establishes segregation of duties
INCREASED LIMIT

As of July 10, 2019:

• Increased single transaction limit: $4,999
• Increased credit limit: $20,000

These are system-wide limits. Consult your Fiscal Officer for internal procedures/guidelines.
ACCEPTABLE USE

• Small dollar transactions under $4,999
• One-time purchases from suppliers not in BUY.IU
• Suppliers that do not accept Purchase Orders
• Hospitality under the limit where no contract is required*
• Conference registration fees

More info: Proper Usage Guidelines

*All campuses except IUPUI. Hospitality over $250 must utilize Chartwells
US BANK STATEMENTS

• Starting October 1, 2019, US Bank statements will be accessed online only
• Establish online access to view statements online
• Statements are for reference only

More info: Online Account Access
SUPPORT

Questions on usage?

• Contact your Fiscal Officer first

Reconciliation or card issues?

• Email: pcardhlp@iu.edu
BUY.IU UPDATES
I TRIED ACCESSING BUY.IU FROM AN EMAIL AND GOT THIS:

![Identity Provider - Unable to Respond](image)

- This message appears if you have not accessed BUY.IU prior to clicking the email link
- Login to BUY.IU, then try link again
MY REQUISITION IS SITTING AT THIS WORKFLOW STOP:

- The supplier must be invited and complete the onboarding process, or is in the process of registering.
- If you haven’t already, share the New Supplier Flyer.
WHAT’S THE APO LIMIT?

• APO = Automatic Purchase Order
  • Orders that do not require review by Purchasing staff prior to release

• As of July 1, 2019, the APO limit was raised to $4,999

• Need Purchasing’s review? Check the “Order Restricted?” box in the General section of the Requisition
ORDER RESTRICTED? BOX

Order: 2715274

Requisition: photographer for welcome week event

Status: Draft

Document Total: $1,000.00 USD

What's next for my order?

General

Cart Name: photographer for welcome week event

Description/Business Purpose: no value

Prepared by: Sarah Chavez

Prepared for: Sarah Chavez

PO Clauses:

1. Contractor

Order Restricted?: 

Has the order been attached or approved for this transaction type in the last 30 days?

Lines
HOW DO I LOCATE MY PO NUMBER?

- Locate the completed Requisition
- Click “View Related Documents” link
- Click “View” next to Purchase Order
  - Only distribute POs in “Completed” status
- The PO number includes “PO”
  - Example: PO0001234
  - Ensure your supplier uses the full PO number on invoices!
### Summary

**Requisition: 2697040**

**Purchase Order: PO0004805**

**Status:**
- Completed
- (7/15/2019 11:32 AM)

**Submitted:**
- 7/15/2019 10:22 AM

**Cart Name:**
- Admin Support Surface Pro 6 order

**Prepared by:**
- Sarah Chavez

**Purchase Order:**
- PO0004805

**Owner Phone:**
- +1 912-856-4574

**Order Restricted?**
- **No**

**Has an ICQ been attached or approved for this transaction type in the last 365 days?**
- **No**
I NEED TO AMEND MY PO. HOW DO I DO THAT?

• Initiate and submit a Change Request
• Change Requests are initiated by the department
• Route to FO Approval workflow stop and Purchasing for review and approval
• Notify Purchasing via Comment if update PO should be sent to supplier — not automatic

More info: Change Request documentation
WHERE CAN I GO TO LEARN MORE ABOUT ALL OF THIS?

- Review the BUY.IU Resource page: https://go.iu.edu/buyiu
- Review documentation
- Sign up for a training
- Receiving & Accounts Payable registration now open
- Review training reference guides
I’VE REVIEWED THE RESOURCE PAGE BUT WANT TO LEARN MORE!

• Check out Purchasing’s new SOPs!
• Each Standard Operating Procedure (SOP) contains additional guidance
• May also include step-by-step procedures

More info: Purchasing SOP page
QUESTIONS?

BUY.IU