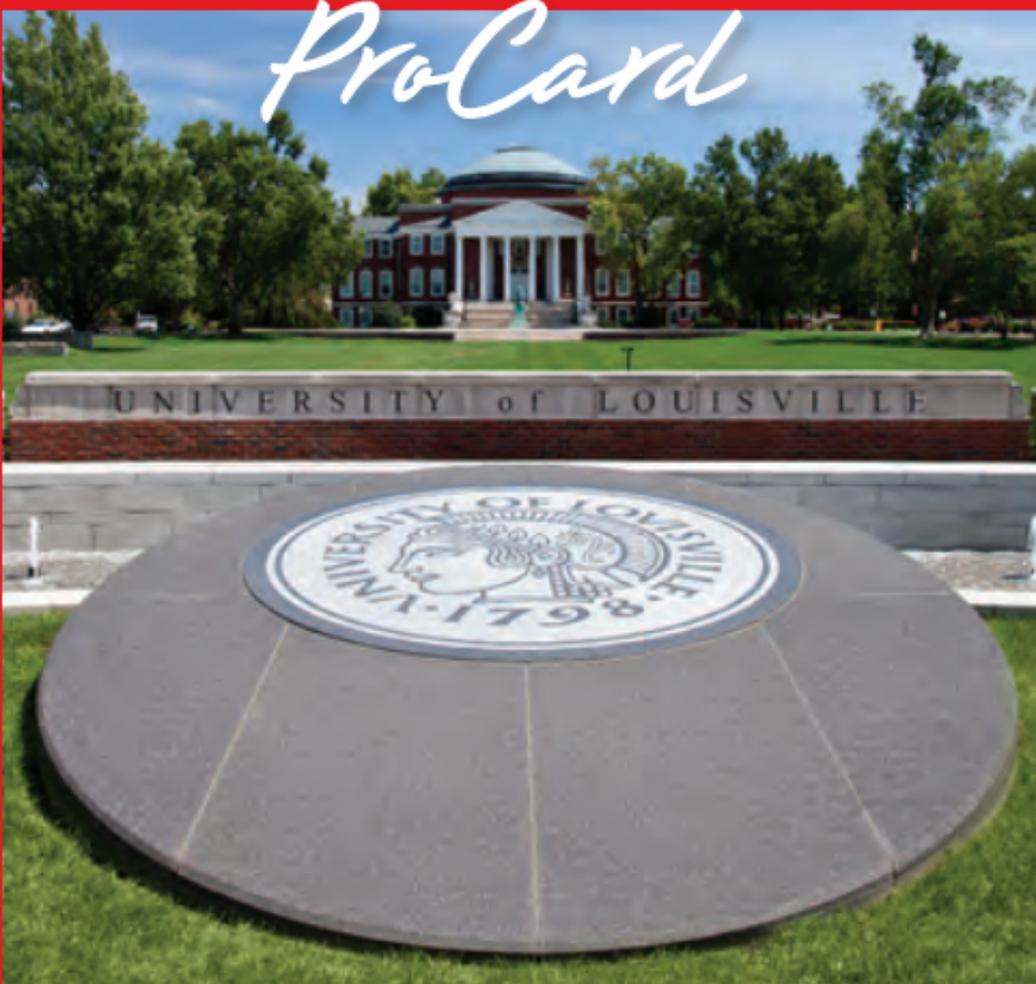


UNIVERSITY OF LOUISVILLE[®]

ProCard



ProCard Office Contact Information

Belknap Campus Main Office

Houchens Building, LL05

Monday-Friday, 8:30am - 4:30pm

Health Sciences Campus Satellite Office

Kornhauser, 101A

Tuesdays 11:00am - 1:00pm

P: 502-852-7520

F: 502-852-7628

Email: procard@louisville.edu

Website: louisville.edu/procard

The University of Louisville is exempt from Kentucky sales tax.

TAX ID: C-102

*The information in this booklet is subject to change. Published February 2015.
Please visit the ProCard website for the most up-to-date information.*

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Card Security

Keep the card secure at all times. The ProCard is to be protected by the same safeguards that are applied to the security of a personal credit card.



Lost or Stolen Card

If a ProCard is lost or stolen:

1. Immediately notify PNC Bank:
1-800-685-4039.
2. Complete the **Lost or Stolen Card Notification Form** and fax to the ProCard Office at 852-7628.

Suggested Uses of the ProCard

The ProCard must be used for all purchases less than \$2,500, if accepted by the vendor and not listed as a ProCard restriction.

For any purchase, if a contract is required by the vendor (ex. room rentals, catering, entertainers, etc.), the contract must be reviewed and executed by the Department of Purchasing.

- Appliances
(must have Energy Star rating)
- Business Meals
(including alcohol purchases)
- Catering
- Cell phone bills
- Computer equipment
- Dues/Memberships
- Employee appreciation/gifts/recognition, less than \$100
(tangible items only, no gift cards)
- Entertainment expenses (including alcohol purchases)
- Entertainment Contracts
- Equipment, Equipment Repair and Rental
(valued at \$1000 or greater must be submitted to Inventory Control for tagging purposes)
- Gasoline for rental vehicles for one-day trips only
- Industrial gases, i.e. oxygen, acetylene, propane
- Instructional material & supplies

Suggested Uses of the ProCard

- Laboratory & medical supplies & chemicals
- Meeting/conference room rental
- Office supplies from OfficeMax/Office Depot
- Postage
- Registrations
- Software and software licenses
- Subscriptions
- Temporary help
(agencies contracted through Human Resources)
- Travel expenses for university guests, excluding
airfare/rental car
(cannot be used for employee or student travel expenses)
- Utilities

**For more information on suggested uses,
refer to the Procure-to-Pay-Grid:**

<http://louisville.edu/purchasing/procure-to-pay-guidelines>

This is not an all-inclusive list. There may be items not mentioned on this list that are acceptable purchases. Contact the ProCard Office if you are uncertain about any purchase.

Restrictions of the ProCard

- Airfare
- Cardinal Card deposits
- Contributions/donations
- Controlled substances/narcotics
- Faculty, staff and student travel: includes Visas, passports, lodging, meals, gasoline, airfare, immunizations, etc.
- Firearms/ammunition
- Gasoline - unless purchased for a one-day car rental or group van rental.
- Gift cards
- Insurance (commercial)

**PERSONAL PURCHASES
ARE STRICTLY FORBIDDEN**

Restrictions of the ProCard

- Movement of household goods/relocation expenses
- Parking permits (UofL permits)
- Printing
- Products available through University Stockroom
- Radioactive material
- Rental cars/vans
- Services subject to Personal Services Contracts; i.e. consultants, legal services, etc.
- Shipment of hazardous materials
- Subcontracts on grants

**PERSONAL PURCHASES
ARE STRICTLY FORBIDDEN.**

Cardholder Responsibilities

- Complete a **Transaction Summary Log** monthly, recording information about each transaction, including date, vendor, amount, description of item(s) and the business purpose.
- Ensure the **Employee Usage Agreement** is signed by any employee, other than the cardholder, who uses a ProCard.
- Complete the **Sign In/Out Log** if the card is checked out to another employee. The cardholder/responsible party is responsible for recording the name, date taken, date returned, purpose of the transaction, and a signature from the faculty/staff member utilizing the card.
- Retain original, itemized receipts, Transaction Summary Logs, and PNC Bank statements for a period of three years. (Refer to the Controller's Office Retention of Records Policy for the archival period associated with grants and contracts.)
- Verify all transactions on the monthly bank statement. Disputed charges must be reported to the ProCard Office and PNC immediately.
- Complete the **ProCard Receipt Form** when no receipt is available.

Spending Limits and Guidelines

Spending limit per transaction: _____

Spending limit per month: _____

Single purchases cannot be divided to circumvent the per transaction limit. This type of process is called a “split transaction” and is a violation of ProCard policy.

Transaction or monthly limits may be increased, either permanently or on a temporary basis, with approval from the department head/chair.

There is no annual limit; therefore, reconciling your monthly statement to PeopleSoft Financials is essential for budget control.

Merchant Returns and Exchanges

A credit to the same PNC account may be issued by the merchant for returned good(s) OR you may exchange the item. If the exchange is not an even transaction, i.e. dollar amounts are not the same, it's best to ask the vendor to credit the full amount of the item you are returning and complete a new transaction for the new item.

Receiving cash or checks to resolve a credit is prohibited.

Entertainment Purchases

The ProCard is the required payment method for all entertainment expenses.

Meals or events that are primarily social in nature (i.e. public relations, development, etc.) and have a UofL-related business purpose may be permitted. Examples of acceptable entertainment expenses include:

- Alumni events and receptions
- Catered events in celebration of University milestones.
- Commencement-related events
- Donor and donor prospect meals and receptions
- Faculty, staff, and student awards and appreciation events
- Meals including University guests and other non-employees
- Receptions for visiting scholars, dignitaries, award winners, etc.
- Recruitment of prospective faculty, staff, or students

Business Meetings/Meals

The ProCard is the required payment method for all business meal expenses.

For a meeting to be considered "business related," the meeting must be planned with a defined, strategic business objective. A pre-meeting agenda is encouraged to establish expectations of the meeting. Whenever possible, meetings should be conducted outside of normal meal periods.

Official departmental parties open to all employees are permitted. Non-allowable expenses include parties or meals for social functions such as employee birthdays, weddings, births, and other personal events.

Alcohol Purchases

When entertaining university guests, or when hosting a university-related function, it may be appropriate to serve alcoholic beverages. In these cases, alcoholic beverages may be purchased with a ProCard and charged to discretionary funds.

Travel

The ProCard **cannot be used** for faculty, staff, or student travel.

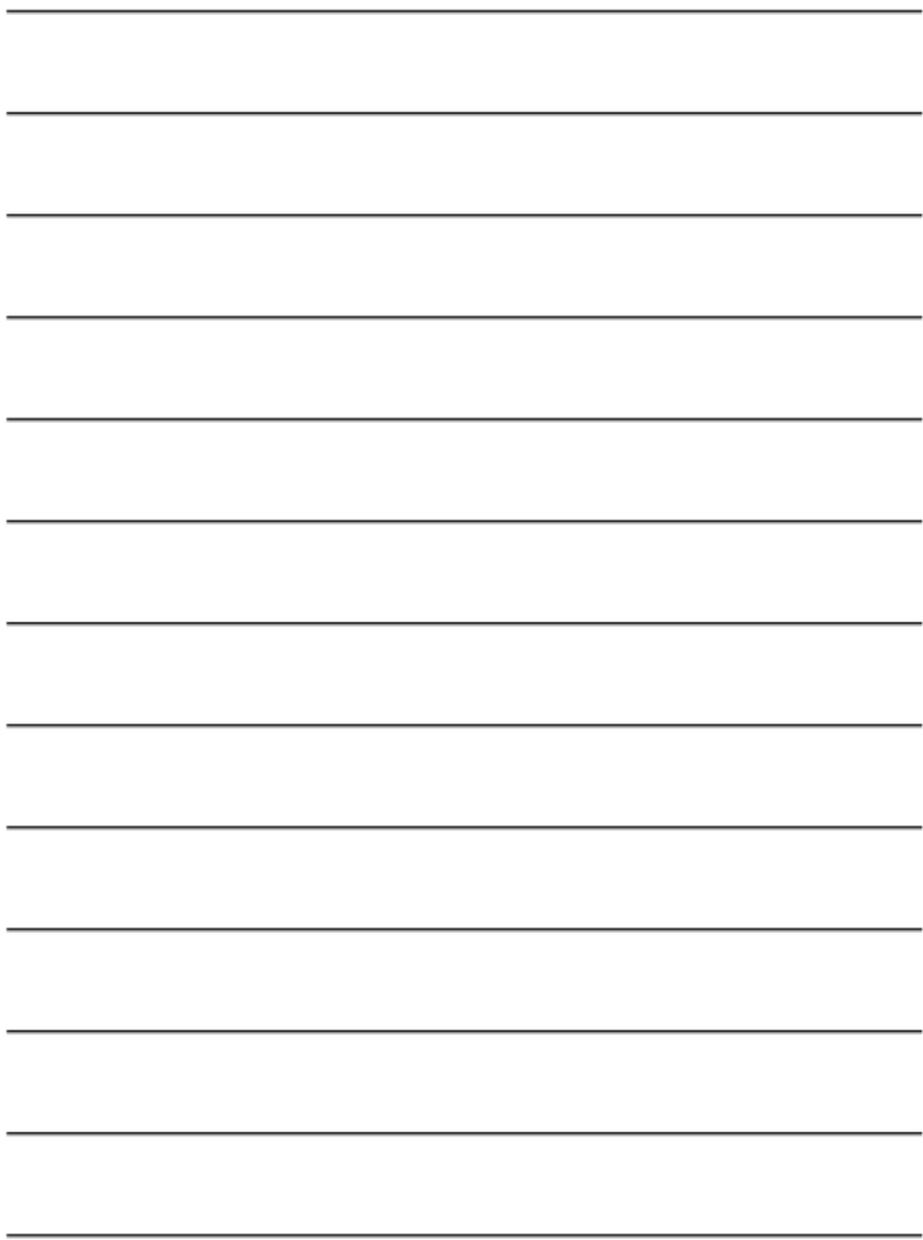
The ProCard **can be used** for guest travel expenses (except airfare and rental car) for authorized university purposes, such as recruitment.



Sales Tax

University purchases are exempt from Kentucky Sales Tax. Advise the vendor that your purchase is tax exempt before the sale/transaction is completed.

Sales Tax Exemption Certificate form can be found online:
<https://louisville.edu/purchasing/forms/taxexempt.pdf>



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