Biomedical Engineering Department Procurement Card (Pro Card) Policies & Procedures  
Effective: 4/1/10

**Description of Policy:**
There are strict guidelines issued by the university’s Purchasing Department. To review the university’s procurement card policies please visit [http://www.utexas.edu/admin/purchasing/procard/index.html](http://www.utexas.edu/admin/purchasing/procard/index.html). Any purchases that are not in compliance with the university’s procurement card policy are strictly forbidden and could result in procurement card privileges being revoked not only for an individual but also for an entire department.

**Description of Procedures:**
1. **Procurement card purchases are required to be approved in advance.** The Biomedical Engineering (BME) Chair’s Office requires card users to fill out the Preauthorization Procard Charge form and receive authorization prior to purchase. Faculty members may provide Graduate Research Assistants and Administrative Team Members with authorization privileges; however, a preauthorization form must be on file. The authorization form is only effective for one fiscal year beginning on 9/1/XX and ending 8/31/XX.
   - If the total payment to be made to a vendor for a single transaction, including freight, is $4,500.01 or more, a purchase order must be used. There are several departmental cards that have increased limits. These cards may go over the $4,500.01 limit. However, no purchase exceeding $5,000.01 may be made using the procurement card; instead a purchase order must be completed.
   - Do not split payments to a vendor to bypass the proper purchasing procedure. This will result in loss of card privileges.
   - If the item to be purchased is on a State Term Contract or UT Blanket Order, the cardholder must verify that the vendor will accept a procurement card for payment. If the vendor does not accept the procurement card, a Purchase Order must be used.
   - All purchases made with a procurement card are exempt from State of Texas sales tax. The cardholder should monitor all transactions to ensure that tax is not charged on any procurement card purchases.
   - For all purchases over $500.00, the cardholder is responsible for verifying that a potential vendor is in good tax standing with the State of Texas.
   - Purchases using PayPal are strictly prohibited.
   - Purchase of software, computers, and related hardware require a secondary approval from the Computer Services Team, i.e., Chris Cooper or Jim Pollard.

2. **Cardholder or Administrative Team Member makes Pro Card purchase.** The Preauthorization Procard Charge form must be submitted along with receipts to the designated Administrative Team Member within three business days of the purchase. All receipts must be itemized. If a receipt is lost or the vendor did not provide one, a memo from the cardholder must be provided and signed by the Department Chair.

3. **The Financial Analyst submits VP7 docs in *DEFINE by monthly Dean’s Office deadline.** The Administrative Team Members will receive e-mails, generally, by the fifth of each month from the Financial Analyst. The Dean’s Office deadline will be seven days before the Purchasing Office’s deadline. Administrative Team Members are to ensure that the documents are coded and supporting documentation is on hand prior to the internal deadline.

**Instructions:**
The Senior Administrative Assistant to the Chair is designated (in *DEFINE via US1) as the first contact for VP7 and VP9 documents for your unit code and therefore is designated as the document creator.
   - The Administrative Team Members will receive an e-mail from the Financial Analyst each month informing them that the VP7 and VP9 documents are ready for review. Documents are accessible from YB2, Log on ID: BNMH in *DEFINE.
   - Please change the object codes for all items purchased on the VP7 and update the departmental coding. Refer to the GG8 & GG9 screens for help with the object codes. You should also refer to the
Office of Accounting’s Coding Table for Purchases of Controlled items. Contact Inventory at 512-471-3838 for information on controlled items.

- If the purchase is a **CONTROLLED ITEM**, please make a copy of the invoice and write down the serial number and location of the item and provide the information to the BME Inventory Control Manager. Examples of controlled items are: guns, rifles, furniture, equipment, animals and artifacts.
- You may also need to **change the account number** from the default account number.
- Please provide the original document and a copy to the Financial Analyst for review and final departmental approval.

**More tips for completing the VP7:**

- Type a brief description in the Comments area of section 3.
- **If the voucher corresponds to a credit**, please provide the document ID for the original charge in the comments line.
- If a procard was used to **purchase items for someone other than the individual cardholder**, please use the DTN coding option and place the person’s last name there.
- **For items that require an inventory tag**, include a brief description, the serial number and location in the comments section. In cases, where there are multiple items, please state "see notes" and include the information in the document notes.
- **Contracts and Grants** will need to identify certain items by object code for 26 accounts.
  - Office supplies must be coded 1401
  - Equipment over $500 must be coded 1837
  - Computers must be coded 1847
  - Telecommunication must be coded 1867

4. **A VP7 transaction log** must be maintained by the Administrative Team Members.

5. **Original paperwork is submitted to the Dean’s Office for final approval for VP7s. VP9s are approved at the departmental level.** The original receipts with a copy of the voucher cover sheet are sent to the Office of Accounting Document Processing for imaging.

6. **Following the university’s records retention policy**, the BME file copy of the paperwork (voucher cover sheet, receipts, and any other supporting documentation) is to be kept on file for one year. The department’s file copy can be disposed of after one year if all of the pages appear when you log onto the Image Retrieval System (UT EID required). If paperwork is not sent to Office of Accounting for imaging, the department will need to send a copy to Imaging. Otherwise, the documentation must be for eight years by the department. The Office of Internal Audits will audit all departmental procurement card procedures and cardholders at intermittent times. Records will also be reviewed monthly by the Office of Accounting, the Purchasing Office, and the Office of Internal Audits via electronic reports from the bank.