



CALIFORNIA STATE UNIVERSITY
DOMINGUEZ HILLS

PROCUREMENT AND CONTRACTS

**PROCUREMENT CARD (P-CARD)
POLICY MANUAL**



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SECTION I – MISSION STATEMENT

The goal of the Procurement Card (P-card) Program is to increase purchasing efficiency by enabling the direct purchase of low dollar, high volume commodities, as well as limited services.

THE P-CARD SHALL ONLY BE USED FOR OFFICIAL STATE BUSINESS.

SECTION II – ABOUT THE P-CARD PROGRAM

The P-card Program is administered through the Procurement and Contracts department. The program is designed to provide a simplified method for cardholders to procure purchases of authorized goods, supplies, or limited services by using a university issued credit card. This program provides a procurement tool to be used as an alternative to purchase orders, contracts, and direct pay for small dollar purchases.

Using a widely accepted US Bank issued Visa credit card, designated employees may make purchases at a merchant's place of business, by telephone or via the Internet.

The P-card is only meant to expend Stateside funds and may not be used for purchases expending Toro Auxiliary Partners (*previously Foundation*) funds.

The P-card should be considered the first option before other procurement methods to obtain allowed commodities. Leveraged purchasing agreements made available through CSUBUY should take precedence when making low-value purchase transactions. Cardholders are encouraged to use the P-card in CSUBUY to achieve cost savings and improve processing time.

The [CSUBUY Marketplace](#) may be accessed through the campus portal. Please login using your campus credentials.

SECTION III – BENEFITS OF THE P-CARD PROGRAM

The following are benefits to using the P-Card program:

1. It is a simple way for campus departments to purchase office supplies and other authorized low dollar purchases using a credit card.
2. The issuance of the P-card provides an alternative to traditional procurement methods. It is not intended to replace the existing purchasing methods, but rather to supplement them.
3. The P-card allows departments to effectively control and monitor small purchases while reducing procurement related time and paperwork.
4. Using p-cards gives departments greater spending flexibility.
5. Provides shortened processing times and faster payment to suppliers.

SECTION IV – DELEGATION OF AUTHORITY

The CSU's authority to procure goods and services is granted under CSU Policy, <https://calstate.policystat.com/policy/11714239/latest>, through the Board of Trustees, to the Chancellor, to the campus President, to Procurement and Contracts. The policy establishes minimum standards for the use of Procurement Credit Cards.

Delegation for the purchase of goods and services under the P-card program has been further delegated to cardholders up to their respective credit limits.

SECTION V – CONFLICT OF INTEREST

[The Political Reform act of 1974](#) (*Government Sections 81000, et seq*) requires that university employees who “are deemed to make or participate in decisions which may foreseeably have a material effect on a financial interest” of their own, must file financial disclosures indicating their interests which might fall within the “conflict of interest” category.

Conflict of Interest is defined as follows: “No public employee at any level of state or local government shall make, participate in making or in any way attempt to use his [or her] official position to influence a governmental [CSU] decision in which [s/he] knows or has reason to know [s/he] has a financial interest.” Gov't Code § 87100. Any person who willfully violates the general prohibition is guilty of a misdemeanor. Gov't Code § 9100.

All cardholders and Approving Officials are responsible for conducting business in an ethical manner and adhere to the following:

1. All CSU employees in a designated position and interim disclosure positions must file a Statements of Economic Interests (Form 700) on an annual basis and take the COI Training within 6 months of assuming office, and then every two years after.
2. Purchases shall not be made from companies where the person purchasing the goods has an economic interest. Such purchases may have at least the appearance of wrongdoing and should therefore be avoided. Avoid involvement in any transactions that could be a conflict between personal interests and the interests of the CSU.
3. Conduct business in good faith; demanding honesty and ethical practices from all participants in the purchasing process.
4. Avoid gifts, gratuities, rebates (not issued in the name of University), kickbacks, rewards points or credit, or other incentives provided to the cardholder to influence or appear to influence the decision to make a purchase from a vendor.

The remedy for the intentional use of the P-card to defraud the University can include the reimbursement of such charges, P-card suspension or cancellation, disciplinary action in accordance with the Education Code. Section 89535 (i.e., suspension, demotion, or termination) and/or criminal prosecutions. This prohibition applies to all CSU employees.

Cardholders are delegated limited purchasing authority on behalf of the University, and as such, have the responsibility to ensure that purchases made on their P-card do not fall within the definitions of a conflict of interest.

All cardholders are required to complete and submit a Statement of Economic Interest ([Conflict of Interest Form 700](#)) upon request of a P-card. Please contact Human Resources for more information at www.csudh.edu/hr or 310-243-3771.

SECTION VI – ELIGIBILITY, CREDIT LIMITS, AND P-CARD DISTRIBUTION & RETURN

1. ELIGIBILITY

The P-card program is available to CSU employees only (faculty, staff and annual renewable hires). Temporary staff, whether from agencies or via emergency hire program, retired annuitants, volunteers, students and student assistants are NOT eligible for the P-card program.

Eligible employees requesting a P-card should follow the steps below:

1. Submit a completed [P-card Application Form](#) [PDF]. The completed application shall be submitted to Procurements and Contracts and shall include the Approving Official's name, signature, and an alternate. approving official, and division head, to p-card@csudh.edu. Submissions can be electronic or hard copy.
2. Complete Conflict of Interest Training, which is available online via Skillport. Submit the [Conflict of Interest Form 700](#) to Linda San at lsan2@csudh.edu.
3. Complete and submit a [Request Access to PeopleSoft Financial Application Form](#) [PDF] to Campus IT to gain access to CFS for monthly reconciliation.
4. Cardholders are required to complete mandatory P-card training. The training link will be sent to applicant. Please note that the requester and approver (if a new approver) must complete this training in order to receive the card.
5. Once the above steps are completed, the cardholder shall be required to sign the P-card Agreement, acknowledging familiarity with the rules and regulations in this procedure.

Upon completion of pre-requisites listed above, the P-card will be distributed to cardholder.

2. CREDIT LIMITS

The standard credit limit for a new P-card request is \$2,500. Authorization for higher credit limits can be granted based on anticipated usage and pre-approval. Cardholders shall discuss departmental needs with the Approving Official and decide if a higher P-card limit is required.

Once the card is issued, should a greater limit be required, a new application, signed by the Approving Official, will be required and shall be forwarded to the P-card Administrator at p-card@csudh.edu for review. Final determination rests with Procurement and Contracts.

3. DISTRIBUTION AND RETURN

P-cards not picked up by the cardholder within two weeks of notification will be canceled and destroyed. A new P-card will require a new request using the P-card Application form. Additional training may be required at the discretion of the P-card Administrator. Failure to

attend training may result in the suspension or cancellation of the P-card, at the discretion of the Director of Procurement and Contracts.

The P-card shall be surrendered upon request from Procurement and Contracts, the Approving Official, or when the relationship with the University is severed. The P-card shall be returned to the office of Procurement and Contracts.

SECTION VII – ROLES AND RESPONSIBILITIES OF PROCUREMENT AND ACCOUNTING

1. PROGRAM ADMINISTRATION

Procurement and Contracts and Accounting Services jointly administer the program, and are responsible for accumulating, reporting, coordinating, auditing, and evaluating all aspects of the program. The use of the P-card is a privilege, as well as a cost effective and efficient method to procure goods. Failure to comply with the procedures in this guide (including timelines) may result in temporary or permanent revocation of this privilege. *Refer to Policy Infractions for more details.*

2. PROCUREMENT AND CONTRACTS RESPONSIBILITIES (P-CARD ADMINISTRATOR)

The P-card Administrator is responsible for coordinating and evaluating all aspects of the program including:

1. Providing support to campus departments participating in the P-card Program.
2. Process requests for p-card issuance, including verification of eligibility and limit determination.
3. Provide support to departments participating in the P-card Program.
4. Conduct Training
5. Reporting and Audits
6. Enforcing policies and procedures including suspensions, cancellations, and revocation of P-cards.
7. Work with Human Resources, who shall notify P-Card Administrator of the effective date of any employee separation to coordinate P-Card deactivation.
8. Review, issue, and notify approvers of policy infractions Procurement and Contracts shall maintain files of current and past users (purge past users after three years).

3. ACCOUNTING SERVICES RESPONSIBILITIES

1. Pay procurement cardholder account statement.
2. Conduct monthly auditing of all P-card Reconciliation Statements.
3. Notify the cardholder when monthly P-card Reconciliation statement is due.
4. Notify cardholder of missing receipts, approvals, or other required purchase documentation.
5. Inform P-card Administrator of monthly audit findings.
6. Work with departments to correct chartfield charges via expenditure transfers.
7. Assess use and sales tax when applicable.
8. Manage Travel Program.

SECTION VIII – CARDHOLDERS RESPONSIBILITIES

1. USAGE

The P-card may only be used by the cardholder and shall not be shared with or delegated to other individuals at any time. This may result in the revocation of your card.

It is the cardholder's responsibility to ensure their P-card is used in accordance with the P-card program policy. Cardholders are reminded that revisions can be made throughout the year and shall periodically review the campus policy for full compliance.

When placing orders for delivery to campus, the cardholder shall provide vendor or supplier with complete address information including department delivery location and cardholder name.

2. HOME DELIVERIES

Home deliveries are strictly prohibited unless the employee is working remotely. The cardholder is only authorized to purchase supplies through Staples, and must follow the Home Delivery process defined at <https://www.csudh.edu/procurement-contracts/covid-19-updates/>.

Home Delivery purchases shall be authorized for home delivery as follows:

- Requesters shall send detailed product information as well as a brief justification for home delivery to their approving official for review and approval.
- When purchasing IT equipment, requester must ensure approval from IT by completing the [ICT Form](#).
- Both the Approving Officials and the ICT approvals must be submitted with the P-card Reconciliation.

3. SECURITY

The cardholder is responsible for:

- Proper security and usage of their P-card.
- **Do not share account or passwords.**
- All transactions processed using the P-card.
- Notifying the P-card Administrator immediately whenever a cardholder transfers to another department or separates from the University.
- Keep card and card number in a secure place.

4. BUY RECYCLED PRODUCTS

The CSU is required by State Law to assure, to the maximum extent economically feasible, the purchase of materials, goods, and supplies that are recycled or have recycled material within their content. Fitness and quality being equal, purchase preference shall be given to recycled products whenever such products are available, and the cost of such products is no greater than that of their non-recycled counterparts.

5. RECONCILIATION

The billing cycle ends every 25th day of the month. Accounting Services will upload the charges into PeopleSoft and charges should be available to reconcile in 2-3 days after the billing cycle closes. Accounting Services will send an e-mail to all cardholders providing the reconciliation packet due date.

The cardholder is responsible for completing the monthly reconciliation of the P-card as detailed in the P-card Reconciliation Handbook and the Monthly Reconciliation Section of this policy manual. The reconciliation responsibilities include:

- Login to CFS to verify charges
- Enter detailed descriptions for each charge
- Review and edit (if necessary) Account number, Fund, Department, and Program
- Save report in landscape orientation, in PDF Format
- Attach original receipts in order of the charges on the report
- Attach Hospitality Forms if applicable
- Attach IT and Procurement approvals where applicable
- Submit by due date

The cardholder is responsible for:

- a. Completing the monthly reconciliation, including the final reconciliation in the event of employee separation or transfer to a new department.
- b. After a purchase transaction is completed, the cardholder shall retain the itemized receipt. The receipt should have a clear description of the item being purchased, cost of the item, merchant name, merchant address, merchant phone number, method of payment, and net zero amount owed. Packing slips, quotes, itineraries, and confirmation notices are not considered valid receipts.
- c. When P-card report becomes available, the cardholder will review each transaction in PeopleSoft, change the default chartfield as appropriate, and enter the proper description for each transaction. Most commonly used account codes are:

660003 – Supplies and Services

606001 – In-State Travel (for CSU student travel only)*

606002 – Out of State Travel (for CSU student travel only)*

660009 – Training and Professional Development

660042 – Recruitment

660017 – Advertisement for recruitment

*Effective January 1, 2024, the P-card may not be used for employee travel expenses.

For current account code guide, view the [Chart of Accounts](#).

- d. The “disputed” box must be checked for disputed transactions. The “tax” box must be checked for purchases where the card holder was not charged tax. In the event of

errors, must work with Approving Official, and Accounting Services to correct the charges via expenditure transfer form.


- e. The reconciliation page must be saved in PDF format and signed by both the cardholder and their approver. If the current approver is unavailable to sign, the department Dean or VP may be an alternate signer.
- f. If the cardholder is absent or on vacation during the period in which monthly submittals are due, the approving official is responsible for ensuring timely submittal of the cardholder's packet.
- g. If the Approving Official is absent or on vacation during the period in which the monthly submittal is due, the cardholder is responsible for submitting completed package (excluding Approving Office signature) to PcardRecon@csudh.edu to avoid receiving an infraction. Once the Approving Official returns to campus, cardholder shall submit signed reconciliation statement to the Accounting Services department. Please refer to the Handbook below for step-by-step instructions.
- h. The P-card reconciliation packet should be sent to Accounts Payable at PcardRecon@csudh.edu.
- i. If the Approver changes due to transfer of department or due to delegation of disapproval authority changes for the assigned chartfield, the cardholder must submit a new P-card application.

6. DISPUTES

Disputed charge(s) are amounts the cardholder believes to be incorrect or where goods and/or services were not delivered. If a disputed charge appears on the monthly statement, it must be flagged as "Disputed" by checking that box. The cardholder is required to contact the merchant for a dispute resolution of the charge. It is the cardholder's responsibility to monitor and continue the dispute resolution process through application of appropriate credit.

The cardholder is responsible for flagging disputed charges in PeopleSoft and contacting the merchant to seek dispute resolutions of the charge(s). It is the cardholder's responsibility to monitor and continue the dispute resolution process through the application of appropriate credit.

Reference #:

- | | | | | |
|------------------------------------|--------------------------------------|---------------------------------------|-----------------------------------------|-----------------------------------|
| <input type="checkbox"/> Equipment | <input type="checkbox"/> Tax | <input type="checkbox"/> Registration | <input type="checkbox"/> Printing/Promo | <input type="checkbox"/> Computer |
| <input type="checkbox"/> Service | <input type="checkbox"/> Hospitality | <input type="checkbox"/> Other | <input type="checkbox"/> Disputed | <input type="checkbox"/> Travel |
- 

In both dispute and fraud instances, the P-card Administrator must be notified as soon as the charges are discovered. Please contact the P-card Administrator with any questions.

7. FRAUD

If a fraudulent charge(s) is discovered, the cardholder must **immediately** contact U.S. Bank and report the charge by calling (800) 344-5696. If U.S. Bank discovers fraudulent activity before the cardholder does, it will:

1. Place the card under fraud referral status which suspends the card and makes it unusable.

2. Attempt to contact the cardholder via phone. If the caller is unavailable, a message shall be left only if the cardholder's voicemail identifies them. If the voicemail does not identify the cardholder, no message shall be left, and the bank may or may not attempt to reach the cardholder at a different time.

The P-card Administrator is notified by the merchant when cards placed are placed on fraud referral status and will contact the cardholder to notify them of such status, at which time cardholder shall immediately contact the bank for further instructions.

The bank will require the cardholder to sign an affidavit attesting to the fraudulent charge(s). It is important that this documentation be completed and returned to the bank as soon as possible as it is the basis upon which the university is reimbursed for fraudulent charges. A copy of the affidavit must also be submitted with the monthly statement. No merchant contact is required in fraud cases.

8. RETURNS AND EXCHANGES

The cardholder shall make arrangements with the merchant before returning any items. If a replacement item is sent, the merchant will credit the returned item and charge a new transaction, unless there is an exchange of like items.

A refund should **NEVER** be issued in cash; it is a merchant violation to issue cash refunds and a cardholder violation infraction to accept cash refunds.

If there is a problem with an order or goods are returned or exchanged, the cardholder shall maintain sufficient documentation of the transaction, including names, dates, and conversation results. This information may be needed for formal dispute resolution.

9. PAYMENT AND SHIPMENT

Payments should be made at the time of purchase. If a vendor requires that an invoice is to be generated and paid at a later date, payment should be made via PO or Direct Pay (if applicable), and not via a P-card.

Ordered goods set for delivery must be shipped to the CSUDH address. Shipments may not be received at the cardholder's personal address, unless the cardholder is approved for telecommuting, and approval is obtained per the Home Delivery Policy.

All items purchased via phone order or electronically should generally be delivered by the merchant withing a 30-day billing cycle. If the item is not delivered, it is the cardholder's responsibility to follow up on delivery of the order or proceed with cancellations, in which case the cardholder will need to ensure the proper credit is applied to the statement.

10. LOST OR STOLEN P-CARD

If a P-card is discovered to be lost or stolen, **immediate action is required**. The cardholder must contact U.S. Bank, the P-card Administrator, and the approving official (during business hours) as soon as the discovery is made.

Report a lost or stolen P-card in this order:

1. U.S. Bank 24-Hour Customer Service at (800) 344-5696.
2. P-card Administrator via email.
3. Approving Official via email.

If a replacement P-card is needed due to wear or is defective, the cardholder shall email the P-card Administrator, copy the approving official, and request a replacement card.

11. RECEIPTS

After a purchase transaction, whether in person or online, is completed, the cardholder **must** retain the **itemized** receipt for each transaction. The receipt should have a clear description of the item being purchased, cost of the item, merchant name, merchant address, merchant phone number, method of payment (usually has the last 4 of the P-card number), and net zero amount owed. If after repeated requests the cardholder is unable to obtain an **itemized** receipt from the vendor, cardholders shall submit the Affidavit for Lost or Non-Itemized Receipt Form.

If the cardholder loses a receipt, a duplicate copy should be obtained from the merchant. If the merchant cannot produce a duplicate copy, the cardholder shall complete the Affidavit for Lost or Non-Itemized Receipt Form, which shall be included with the monthly reconciliation packet.

Photographed images of the original receipts are acceptable. Unacceptable Receipt Submissions, include: 1) Packing Slips, 2) non-itemized credit card slip, and 3) quotes.

Overuse of the Lost/Missing Receipt of Goods Verification Form may result in issuance of infraction or revocation of P-card.

12. DECLINED TRANSACTIONS

If an attempt to purchase was made and the transaction was declined, the cardholder shall contact the **U.S. Bank 24-Hour Customer Service** line at (800) 344-5696 for information. The most common reasons for a declined transaction are:

- Cardholder did not activate the account.
- Cardholders have reached their monthly transaction/credit limit.
- Merchant is classified under a merchant category code (MCC) that is blocked from use.
- Billing address information provided by the cardholder does not match that which is on file with the bank.
- Merchant has incorrectly noted the card number and/or expiration date.
- The transmission between the merchant and the bank is down.

Note: The cardholder should contact U.S. Bank Customer Service to determine why the card was declined. Depending on the problem, the cardholder may need to contact the P-card Administrator for additional assistance.

U.S. Bank Contact Information:

U.S.: (800) 344-5696

Outside the U.S.: (701) 461-2070 collect

13. NO ACTIVITY ACCOUNTS

A P-card is issued to employees to perform essential functions of their position. When a P-card is not used, it creates a potential risk, such as credit exposure to the University. Based on this risk, a P-card that is not used for 12 consecutive months is subject to closure.

Notice will be sent to the Cardholder to provide the Cardholders an opportunity to use the P-Card before the 12 consecutive months of inactivity. After 12 consecutive months of no card activity, the P-card account will be closed automatically.

14. CAMPUS REIMBURSEMENT

If the cardholder has an unauthorized expense(s) on the P-card, the expense must still be posted in PeopleSoft using the department's chartfield.

If cardholder uses the P-card to make personal purchases, the cardholder will be required to reimburse the campus using personal funds within the same reconciliation period. Cardholders will need to visit the Cashier's Office with a check and a deposit transmittal form to deposit the funds back to the account where the original P-card expense was charged to. The P-card holder shall forward a copy of the deposit receipt to Accounting for record keeping purposes confirming the reimbursement.

If the cardholder makes unallowed state expenditure and Auxiliary funds should be used, the cardholder will be required to submit a check request to the Auxiliary along with the pertinent backup to reimburse the University.

15. POLICY INFRACTIONS

On a monthly basis, the Accounting Department conducts audits of all transactions to ensure adherence to the P-card Policy. In the event of policy non-adherence or missing documentation, the cardholder will receive an email from the Accounting Department (PcardRecon@csudh.edu) requesting additional information and/or missing documentation. The cardholder will have a 5-day grace period to submit missing information. If the cardholder does not respond within the 5-day grace period, the monthly report will be filed as incomplete and submitted to the P-card Administrator for further review, which will result in a policy infraction.

The following will result in automatic infractions (*regardless of the 5-day grace period*):

1. Non-adherence to the p-card policy without prior approval from the Director of Procurement and Contracts, or P-card Administrator.
2. Missing p-card reconciliation packet. The employee's P-card will be temporarily suspended until a complete reconciliation packet is received.
3. Purchase of a Prohibited item (see Section XI)
4. Personal purchases must be reimbursed to the campus, see Section XII. The cardholder will continue to receive a monthly infraction until the reimbursement is completed.

5. Unallowed state expenditure must be reimbursed to the campus with Auxiliary funds. The cardholder will continue to receive a monthly infraction until the reimbursement is completed.

The cardholder and the Approving Official will receive an email notification for each infraction. Three (3) infractions in a six-month period will subject the cardholder to a thirty (30) day suspension. The P-card Administrator will issue the 1st and 2nd infraction to the cardholder and copy the Approving Official.

The Director of Procurement and Contracts, or designee, will issue the 3rd infraction, notifying the cardholder, the Approving Official and the Division Vice President of immediate P-card suspension.

The cardholder will be required to attend a P-card Refresher Training to reinstate P-card privileges. Continual non-adherence of any part of the policy may result in the revocation of P-card privileges and card cancellation.

Using the P-card to commit or facilitate an act that is in violation of state or federal law will result in the immediate cancellation of the card.

16. TRAVEL

Effective January 1, 2024, the P-card may NOT be used for employee travel expenses. An infraction will be issued for each instance.

The P-card may be used only for non-employee travel expenses. All non-employee business travel **MUST** be pre-approved before a travel expense can be incurred using P-card, by submitting a complete and approved Travel Request Form to Accounts Payable at travel@csudh.edu. A travel number shall be issued to the traveler, and this travel number must be indicated on any charge related to that travel instance in the description section of the reconciliation. All charges must be made in accordance with CSU and CSUDH travel policies. Reference the [Travel](#) webpage for more information.

When travel expenses are charged to both the P-card, and a personal card, the Travel Expense Claim Form must list items charged to both cards, and identify items not being reimbursed. A duplicate copy of the P-card purchase receipts must be included in the Travel Expense Claim packet.

Any travel-related purchase that is not allowed by CSU or CSUDH travel policy is considered an unauthorized purchase, will count as an infraction, and is reimbursable to the University.

17. SEPARATION AND TRANSFER

Prior to the last day, the cardholder must:

- Complete a final reconciliation of card purchases
- Contact HR to complete an electronic Form 700

- As part of the separation process, return the P-card to the P-card Administrator.

If transferring to another department on campus, the cardholder shall return the P-card to the P-card Administrator, complete a new P-card Application form, and obtain a new card.

18. HOSPITALITY

Cardholders shall submit the approved [Hospitality Authorization Form](#) with reconciliation statement for any food or beverage, award or promotional item in accordance with the Hospitality Policy, dated March 25, 2019. For more information refer to the [Hospitality Policy Documents](#) on the Accounting web page.

For Campus Catering, the Food and beverage from campus catering services may be procured using the P-card, in accordance with Hospitality Policy. For more information refer to the [Hospitality Using Campus Catering](#) page.

Cardholders must use the campus caterer, *Urban Mosaic*, for all events held at CSUDH. For events in which outside catering vendors are requested, cardholders must first obtain a catering exception prior to purchase by submitting the [Catering Exception Form](#) to Toro Auxiliary Partners. The form must be fully signed and included with reconciliation. For off-campus events, the catering exception form is not required.

SECTION IX – APPROVING OFFICIAL RESPONSIBILITIES

1. COMPLIANCE AND TRAINING

The approving official is the administrator sponsoring the cardholder. Responsibilities of the approving official are:

- Ensure compliance with procurement card policies. Policy can also be found on the Procurement and Contracts webpage, <https://www.csudh.edu/procurement-contracts/procurement-contracts/procurement-card>.
- Have a solid understanding of applicable policies such as [Hospitality Policy](#), and [Furniture Policy](#).
- Understand the purpose and/or scope of the transaction that connects purchases to the business needs.
- Ensure that no prohibited items are purchased.
- Inquire cardholder regarding usual or questionable items.
- Identify possible infractions of cardholder and take appropriate action.
- Approving Official is not authorized to sign his or her own reconciliation submittal.
- Both the cardholder and the approvers must complete training, with retraining as required by non-adherence to policy requirements or at the discretion of Procurement and Contracts based on policy updates and changes.

2. MONTHLY TASKS

- Review of all transactions of assigned cardholders(s) for appropriateness of purchase, on a monthly basis.

- Ensure thorough review of reconciliation submittal and approval all charges made on the P-card, including:
 - Verify original receipts are attached for each charge
 - Verify Account, Fund, Department, and Program
 - Verify Travel related charges adhere to CSU Travel Policy
 - Verify Hospitality charges adhere to CSU Hospitality Policy
 - Verify all charges adhere to the CSUDH P-card Policy
- Ensure proper documentation is included in the reconciliation for all restricted purchases.
- Certify and approve cardholders monthly P-card transactions.
- Ensure reconciled P-card statement submissions are submitted to PcardRecon@csudh.edu by the monthly due date.
- Assigning an alternate Approving Official in the absence of the Approving Official to ensure that the paperwork is submitted to the Accounting Services department on time.
- Retrieve P-cards from employees who change departments or separate from the university.
- In the event of employment separation, if the cardholder is not available, Approver is responsible for returning the P-card to the P-card Administrator and ensuring all documentation is available for the Approving Official and/or designee to complete the final reconciliation submittal.
- Ensure lost P-cards are immediately reported to the P-card Administrator.
- Notifying the P-card Administrator when an employee promotes or transfers from their department.

SECTION X – AUTHORIZED PURCHASES

The P-card may be used for the following, and up to the cardholder’s single purchase limit:

- Commodities such as office, art and paint supplies and books (except as restricted or prohibited below)
- Small classroom items (e.g. lab supplies)
- IT related goods as follows:
 - Digital Content (Fonts, images and photographs, music, and digital documents for specific faculty or staff member). **NOTE SEE RESTRICTED SECTION** for students, visitors, and/or public audience use.
 - Equipment under \$2,500
 - Printers
 - Scanners
 - Monitors
 - Large Screen Display
 - Apple iCloud storage

- Digital and Video Cameras
- Fax Machines
- Webcams
- Keyboards
- Listening devices: Headsets, earphones, ear buds, speakers
- Microphones
- Cables, Cords, and Power strips
- USB portable storage/thumb drive/flash drive
- Wi-Fi Adapters
- SD Memory Card
- Mouse
- Cases for laptops and phones
- Docking stations
- Mounting Equipment
- Batteries
- Port Replicators
- Sound Cards
- Stylus Pens
- Microscopes
- Memberships (except Lifetime memberships)
- Single standalone small furniture pieces (*does not require assembly and/or installation*)
- Advertisements under \$1,000 (*if signed agreement is required, must be reviewed and approved by the P-card administrator prior to purchase*)
- Conference Registrations
- Online training/webinar
- Hospitality expenses, such as purchases for a University-Sponsored event, *refer to Hospitality Policy.*
- Equipment Repairs under \$1,000 where shipment of equipment to vendor location is required (*if a signed agreement is required, it must be reviewed and approved by the P-card administrator prior to purchase*)

SECTION XI – PROHIBITED ITEMS

The P-card may not be used for the following:

- Splitting purchases to circumvent cardholder's single purchase limit
- Personal expenses
- Services
- Cash advances
- Weapons, firearms and ammunition
- Alcohol, tobacco, narcotics and controlled substances
- Furniture (*requiring assembly and/or installation, including replacement of entire offices/suites with freestanding furniture and modular furniture. See Restricted section below for possible exception request*)
- Meal and Employee Travel expenses while traveling on official university business
- Drones

- Construction/modifications/special repairs
- Decorative items (i.e. plants, artwork, etc.)
- Software or Services as listed below:
 - Operating Systems
 - Application Software
 - Installation Programs
 - Software Tools
 - Kiosk
 - Computer Based Training Programs
 - Web/Cloud Applications
 - Website Platforms/Web Subscriptions
 - Hosting a Virtual Conference or Performance
 - Purchasing Virtual Services (examples: Consulting, Training)
 - Free Software/Web Subscription/Applications
 - Web Hosting
- Hardware as listed below:
 - Computer components interior to the machine
 - Copiers
 - 3D Equipment of any kind
 - External Hard Drives
- Memberships in employees name and personal address
 - Any membership in the individual's name and personal address is considered a personal expense, thus not allowable, and will be reported as an infraction. Additionally, the unallowable expense will need to be remedied by either (a) updating member data and providing backup that meets the requirements, or (b) reimburse the campus for the personal expense on the p-card.
- Fuel (*Refer to Voyager Fleet Card Program for instruction on obtaining a gas card for state owned vehicles*)
- Lifetime Memberships
- Animals, Laboratory or Livestock, Animal Cages, Aquariums, as well as all Live Vertebrate Animals (Requires a Requisition and approval from the Institutional Animal Care and Use committee (IACUCU).
- Gifts (gift card, gift basket, flowers, cards, CSUDH promotional items) for anyone for bereavement, birthday, wedding, anniversary, baby shower, retirement, farewell, get well, thank you, appreciation, recognition, etc., *except as allowed by the Hospitality Policy*.
- Honoraria or Independent Contractor Payments

SECTION XII – RESTRICTED PURCHASES

The P-card may be used for restricted items upon **written** approval by the P-card Administrator or designee. Requests for restricted items shall be submitted in writing via email and include a justification for the purchase. If approved, the written approval shall be included in the monthly reconciliation packet when submitted.

NOTE: All transactions requiring an agreement to be executed must be reviewed and signed by the Procurement and Contracts office prior to purchase. These may include but are not limited to equipment rentals, music score rental, banquet and hotel agreements, software or subscriptions. A copy of the agreement shall be sent to p-card@csudh.edu to request review and approval to use P-card prior to purchase.

The following items are restricted:

1. Single Use Plastic Water Bottles, Straws, and Bags

In an effort to support and align with the CSU Single-Use Plastics policy that went into effect in 2018, Single Use Plastic Water Bottles, Straws, and Bags are not allowable for purchase or sale in accordance with the CSU Single Use Plastics Policy (<https://www2.calstate.edu/csusystem/news/Documents/5236-00.pdf>). The CSU Policy also highly restricts purchasing of single-use plastic water bottles with a complete ban on purchases and sales beginning January 1, 2023. In support of compliance with this policy, CSUDH has multiple other options for hydration including:

- Hydration/refill stations available at all campus water fountains in every building on campus.
- Reusable CSUDH co-branded Pathwater bottles available on a chargeback basis through the campus Logistics Department. Ordering instructions are as follows:

If you would like to order pre-filled aluminum reusable Pathwater bottles that are co-branded with the CSUDH logo, departments can place an order (by case of 12 bottles) directly with the campus warehouse by e-mailing Dino Hernandez at dhernandez@csudh.edu.

Please include:

- the quantity of cases you would like
- the campus location where you would like them delivered
- and your department chargeback chartfield information

Bottles are \$18.60 per case (\$1.55 each).

- Rentable water bar and dispenser options through Campus Catering to allow users to refill reusable water bottles at events.

As a result, the purchase of single-use plastic water bottles is restricted, will require special justification, and cannot be purchased using general funds. Budget/cost cannot be the sole basis of a justification request. Cardholders should submit justification to p-card@csudh.edu for review and approval.

2. Professional Memberships

- Memberships directly related to an employment position are allowable; however, the billing details must include the employee's name, CSUDH name, and address.

- **Subscriptions (Paper)** – This is allowed on p-card, but must be delivered to the University address, **not** the subscriber’s home address.
- Any membership in the individual’s name and personal address is considered a personal expense, thus not allowable, and will be reported as an infraction. Additionally, the unallowable expense will need to be remedied by either:
 - Updating member data and providing backup that meets the requirements.
 - Reimburse the campus for the personal expense on the p-card.

REMINDER! Lifetime Memberships are prohibited.

3. Hazardous Materials (i.e. chemical, agents, gases)

Individual Cardholders authorized to purchase hazardous chemicals and agents for laboratory use, are required to place orders through the [Campus Marketplace \(CSUBUY\)](#) unless the required chemical or agent is not available through these provided suppliers, in which case Procurement should be contacted for purchase options. See [Restricted Purchases - Hazardous Materials](#) for more details.

4. Hospitality

Approval must be obtained for any food, beverage, award or promotional item in accordance with the [Hospitality Policy](#). Submit the completed [Hospitality Authorization Form](#) to your appropriate administrator, and ensure that it is included in your reconciliation package along with any other required backup attachments. For more information refer to the [Hospitality Policy Documents](#) on the Accounting webpage.

As defined by the Hospitality Policy the following are authorized on P-card, provided cardholders adhere to the following and the Hospitality Policy:

- **Food & Beverage** purchases from Campus Dining (Urban Mosaic Food)
- **Awards, Prizes, Incentives** (store-bought goods, gift cards, items from bookstore)
- **Décor** for camps event (store-bought)
- **Entertainment Event**
 - Entertainment events include tickets for sporting and recreational events and require President or Designee approval.
- **Sponsorship**
 - A sponsorship is a contribution to the cost of an event in return for advertising or promoting the University. This includes the cost of a vendor table at external events.
 - Payment or reimbursement for attendance at a community relations activity or fundraising event must include documentation of the individual names, affiliations, and direct or indirect benefit to the CSU to be derived from the expense.
- **Clothing and Uniforms (If Logoed, REQUIRES University Communications and Marketing Approval, see below)**

- Branded clothing intended for employees is not considered promotional items. Clothing of a nominal value, \$50 or less (**per person per event**) inclusive of tax, shipping, embroidery, or any other fees associated with customization, provided to employees are allowed as a regular business expense if they are provided to promote or identify them for a specific campus wide event such as New Student Orientation (NSO) or Commencement. Student workers are also considered employees.
- IRS rules state that clothing provided to employees are considered taxable fringe benefit unless they fall under the exclusionary rules, which are:
 - The item is specifically required to be worn as a condition of employment.
 - The item is not worn or adaptable to general usage as ordinary clothing.
- **Promotional Items (REQUIRES University Communications and Marketing Approval, see below)**
 - Customized Products

A customized product is defined as any product that is prepared specifically for the University. Types of customized products include but are not limited to:

- Specialty imprinted or engraved products, including promotional items and screened or embroidered products such as clothing, keychain, coffee mug, calendar, etc.
- Printing services, including custom printed forms.

Customized Products are considered services and are prohibited on P-card, however, to expedite the ordering process for these types of goods, cardholders are authorized to use the P-card with the following pre-approved vendors:

<p>Promotions Dept Nancy Caamal Email Nancyc@thepromotionsdept.com Phone 602-481-7100 www.thepromotionsdept.com</p>	<p>4imprint Kristin Engh Email kengh@4imprint.com Phone 1-877-446-7746 ext 8174 www.4imprint.com</p>
<p>Alliance Printing Joe Bober Email joe@apabrandu.com Phone 562.594.7975 ext. 100 www.apabrandu.com</p>	<p>American Solutions for Business David Begs Email dbeggs@americanbus.com Phone 310-365-4770 www.americanbus.com</p>

Imagen Paul Bower Email kpaul@imagenagency.com Phone 626-593-9618 imagenagency.shop/paul	Jack Nadel International Caitlin Padian Email Caitlin.Padian@nadel.com Phone 310-815-2610 https://www.nadel.com/
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Cardholder **must** obtain approval from [University Communications and Marketing](#) (UCM) prior to authorizing **ANY** purchase. (See *CSUDH Logo/Brand Identity Approval below for details*)

CSUDH Logo/Brand Identity Approval

The CSUDH logo is the core component of our visual identity system. It creates a distinctive graphic presence for our institution and serves as an instantly recognizable visual cue for our constituents. It expresses our brand through color, shape, typography, and style. Approved logos may be found on the UCM website. Any deviations will require approval.

All artwork must be approved by UCM prior to making the purchase. For approval email brand@csudh.edu, and include the following information:

- Department requesting approval, including the Contact Person
- Phone Number
- Email Address
- Description of Product (include item number, colors including imprint color(s) (ink/thread color(s) if applicable, etc.), logo placement, sizes (if applicable)
- A PDF mock-up of the artwork as an attachment
- What is the purpose of the item?
- Who is it for?
- Due Date

Once approved by UCM, please include the email approval with your reconciliation statement.

5. Printing (up to \$5,000.00)

University Printing Services (UPS) operates a full-service Copy and Print Center on campus. Greater utilization of their services will allow cardholders to benefit from lower annual printing costs and will ensure proper oversight of the University's logo, brand, image, and standards.

Paper Printing through UPS is now authorized on P-card (*this includes posters, brochures, banners/backdrop, booklets, and signage*), **however**, prior to using the P-card, cardholders must send all copying and printing needs to UPS at ups@csudh.edu.

UPS will review the request and determine if they have the capacity to complete the request. If the request is accepted, UPS will work with the department on pricing, mock-ups, and logo approval with UCM (*as needed*), and proceed with printing the job. UPS will bill the department directly via chargeback.

In the event UPS is unable to meet the project needs, they will notify the department to use off-site printer. If the amount of the project exceeds \$5,000, the department will need to submit a requisition to complete the request.

When the P-card is used to purchase printed materials that bear the university's name, logo, or seal, the purchase must be made in compliance with Section XII (4), CSUDH Logo/Brand Identity Approval.

6. Appliances

Appliances such as refrigerators, microwaves, coffeemakers, heaters, fan, etc., require business justification and cannot be purchased using general funds. Cardholders should submit a quote or pro-forma invoice and business justification to p-card@csudh.edu for review and approval.

7. Furniture

All furniture orders that require assembly and/or installation such as chairs, tables, desks, bookcases, including modular furniture, etc., must adhere to the [Furniture Purchase Policy and Procedures](#) process, which states that furniture purchases must meet established ergonomic guidelines, ADA compliance requirements, and commercial grade standards, with typical 5 to 10 year warranties for a higher education environment. When selecting furniture, it is important to note that most home and office retailers do not sell commercial grade furniture or fabrics with the smoke and flame spread ratings required for institutional use. Contact Environmental Health and Safety at ehs@csudh.edu for questions on commercial grade standards and smoke and flame spread ratings.

Examples of Non-Compliant Furniture (*unless the vendor can provide warranty for commercial grade*), include IKEA, Amazon, Wayfair, Target, Wal-Mart.

Cardholders may order Individual/single pieces of furniture in small quantities such as chairs (limit 2), free-standing desks or tables, file cabinets, etc., which **do not** require installation and/or set up of any kind. This type of purchase will not require approval.

If minimal assembly and/or installation is required, Procurement and Contracts may approve an exception. An exception will be contingent on two approvals. Cardholders shall email Facilities Services at workcontrol@csudh.edu to request approval to submit a work order for assembly/installation of P-card purchase item. If granted, cardholders can submit a quote or pro-forma invoice to p-card@csudh.edu and include the Facilities Services approval for review and limited approval.

For all furniture that requires assembly and/or installation, including the replacement of entire offices/suites with freestanding furniture and modular furniture orders, requesters must submit a requisition. Please review the Furniture Purchase Policy for details.

In an effort to ensure only the highest quality products and services are offered to departments, Procurement and Contracts has established a list of [Pre-Approved Furniture Suppliers](#) who meet high standards for quality and service. The pre-approved suppliers list has

been developed from competitively solicited contracts available to CSU and from vendors who have long standing relationships with CSUDH. These contracts will allow the department to proceed without the need for bidding or providing sole source or sole brand justification.

8. Hotels and Meeting/Room Space Special Events

Cardholders must submit a requisition via Peoplesoft to enter into an agreement with a Hotel or similar meeting/room space for an upcoming event. An agreement from the hotel or meeting/room space will be required. However, often the hotel or venue will require a deposit to reserve the space.

The cardholder may use the P-card to make a deposit and reserve a hotel or venue for CSUDH business related events, provided the office of Procurement and Contracts reviews and approves the agreement before such reservation is made. Most space reservation and event agreements contain non-standard terms and conditions that must be reviewed and approved by Procurement and Contracts prior to the event.

Cardholders can submit hotel or meeting space agreement to p-card@csudh.edu for review and limited approval.

9. Information Technology (I.T.) *(i.e. software, hardware & peripherals, and online services)*

I.T. purchases and services require four layers of approval. Cardholders should begin by obtaining the first three approvals below by following the [Accessible Information and Communication Technology Procurement Process](#). After receiving I.T., ATI, and Security approvals, cardholders shall forward the final approval request to the P-card Administrator requesting to use the p-card for that specific transaction.

If the cardholder is requesting an exception to the P-card policy to purchase I.T. related goods or services that are restricted, the cardholder must obtain the below four (4) approvals.

Approvals Required for all Restricted purchases.

- Information Technology (I.T.) – Required depending on the impact the purchase/contract or renewal may have on the Information Technology Division or the campus. The cardholder may need to answer additional questions throughout the approval process. The Information Security and Compliance team will connect the cardholder with the appropriate I.T. department to obtain additional information to facilitate this process. I.T. may also require direct communication with the vendor to verify their technical documents and specifications.
- Compliance (ATI) – Section 508 requires that Information and Communication Technology developed, used, maintained, or procured be accessible to people with disabilities. The cardholder will be asked to answer questions such as the number of users accessing or using the software/hardware/system, what type of data will be stored/transmitted, and who is the functional owner of the system. Additional questions may be asked depending on the specific request.
- Security Review – The Security review and approval ensures requests are appropriately assessed for managing the risks to the confidentiality, integrity, and availability of sensitive institutional information and the PII of constituents. Depending on the type of

data stored/transferred with your system, InfoSec office will require additional security reports.

- P-card Administrator – Cardholders shall submit a quote or pro-forma invoice to p-card@csudh.edu for review and approval. The P-card Administrator will conduct a risk assessment and may grant an exception for a one-time purchase on P-card. If an exception is not granted the cardholder will be instructed to enter a requisition.

For further information on I.T., ATI, or Security approvals visit the [Information & Communication Technology Procurement \(ICT\)](#).

A. Computers, Servers, Laptops, and Tablets

(Under \$2,500 including unit price, sales tax, and shipping charges)

Computer Equipment (e.g., touchpads, notebooks, desktops, laptops, servers, etc.) under \$2,500 (or cardholder limit), including unit price inclusive of sales tax, are approved on P-card **ONLY** if:

1. Quote is approved by [ICT process](#). You may contact iso@csudh.edu for a quote or visit CSUBUY to build a quote and include in your ICT request process.
2. Must be purchased through the Campus Marketplace ([CSUBUY](#)), from the vendors listed below.

Product Description	CSUBUY Authorized Vendor
Apple iMac, MacBook, MacBook Pro, MacBook Air and Apple iPad	CDWG
Dell Computers and Laptops	Dell

3. Cardholder shall email a copy of the order confirmations to Asset Management at argarcia@csudh.edu.
4. Upon device delivery, Asset Management will tag the item, and deliver **directly** to the IT.
5. Any computer device should be delivered to IT before the end user regardless of the type of purchase, to ensure installation of management software and anti-virus.
6. After installation of management software, the device will be delivered by IT to the requesting department.

Computer Equipment over \$2,500 will continue to be purchased via requisition and require the quote and ICT approval.

An Asset Tag for equipment prone to theft/loss and may contain sensitive data, such as computers, laptops, servers, and tablets will be required.

B. Digital Content

Fonts, images and photographs, music, and digital documents for students, visitors, and/or public audience use. Requires ICT approval and P-card Administrator approval.

C. **“Free” and Trial-Based software/subscriptions**

Requires ICT approval and P-card Administrator approval.

SECITON XIII – ASSET MANAGEMENT

Asset Management is responsible for maintaining uniform accountability for all University property. This includes providing for accurate accounting, control, inventory, and disposition of university property. An annual physical inventory is conducted by the Property Coordinator as part of this function.

The Non-Capitalized Equipment threshold is between **\$2,500-\$4,999** (including all cost incurred to acquire and to ready the asset for its intended use such as purchase price, applicable tax, freight, etc.), and covers tangible, non-consumable property meeting the following criteria:

- Is not permanently attached/incorporated in the CSU buildings and grounds.
- Used to conduct CSU business.
- Considered sensitive high-risk items which are prone to theft/loss and may contain sensitive data.

Examples include Firearms, Computers, Printers/Scanners, Audio Visual Equipment, Instructional Equipment, Televisions.

Purchases under this threshold are allowed on P-card, except for prohibited items, and adherence to the restricted purchase policy.

Please note that An Asset Tag for equipment below the non-capitalized threshold will be required for items prone to theft/loss and may contain sensitive data, such as computers, laptops, and tablets.

All equipment will be delivered to the requesting department through Logistic Services and will be Asset Tagged. All computers, laptops, and tablets will be delivered directly to I.T. to ensure installation of management software and anti-virus is uploaded. I.T. will deliver the equipment directly to the department after service is completed.

If the department receives taggable equipment without an asset tag, the cardholder will be responsible for contacting Asset Management to request an Asset Tag.

Capitalized Equipment is not authorized on P-card.

Capitalized Equipment is defined as tangible, non-consumable property meeting all the following criteria:

- a unit acquisition cost of \$5,000 or greater (including all costs incurred to acquire and to ready the assets for its intended use such as purchase price, applicable tax, freight, etc.)
- an estimated life of greater than one year

- is not permanently attached to or incorporated in the CSU buildings and grounds.
- Is used to conduct CSU business.

Examples include Motor Vehicles, Electric Vehicles, IT Servers/Software, Copiers, Lab Equipment, and Industrial Equipment.

For full policy visit the [Asset Management](#) website.

SECTION XIV – FREQUENTLY ASKED QUESTIONS (FAQ)

1. How do I request a P-card?

Complete a [Procurement Card Application](#) [PDF] with the appropriate signatures. Email the completed form to P-Card@csudh.edu. **NOTE:** Your department administrator may be contacted to substantiate the validity of the application and provide additional information. Once approved, you will be contacted for training and card pick-up.

2. How do I activate my P-card?

Call the number on the label placed on the front of the P-card. The cardholder will be asked for the zip code, and the last four of your social security number. The last four of the social security number are the last four digits of your employee ID number.

3. What is the difference between my Single Purchase Limit (SPL) and my monthly limit?

The SPL is the amount authorized per each transaction. The monthly limit is the limit allocated for the month.

4. How do I request a Temporary Increase to my P-card Single Purchase Limit?

Cardholder shall e-mail the P-card Administrator to request a temporary increase. The e-mail request shall include:

- Amount of Increase
- Purpose of Increase
- Approving Officials Approval

5. How do I request a Permanent Increase to my P-card Single Purchase Limit?

Cardholder shall complete and e-mail the P-card Administrator a new [Procurement Credit Application](#). The email request shall include justification for permanently increasing the cardholder's limit.

6. How do I request a change to my Approving Official?

Cardholder shall complete and e-mail the P-card Administrator a new Procurement Credit Application, which must be signed by the new Approving Official.

7. I am transferring departments within CSUDH, can I take my card?

No, the cardholder shall surrender the existing P-card and submit a new Procurement Credit Card Application.

8. May I charge travel transactions to my P-card?

Please refer to the [Travel](#) page.

9. Can I use my P-card to charge for gas on my personal vehicle while traveling on business?

No, gas for personal vehicles is not allowed on the P-Card. Employees should request reimbursement for business miles driven with personal vehicles through your Travel Reimbursement.

10. Will the P-card affect my personal credit rating?

No, the P-card program does not affect your credit score in any way.

11. Who can I contact at U.S. Bank if I have questions about my account?

You can call U.S. Bank Customer Service (800) 344-5696 at any time.

SECITON XV – FORMS AND RESOURCES

FORMS:

- [Exhibit A - Lost/Missing Receipt of Goods Verification Form](#) [PDF]
- [Exhibit C - Procurement Credit Card Application](#) [PDF]

RESOURCES:

- [P-card Reconciliation Handbook](#) [PDF]