



Procurement & Warehousing Services

Purchasing Card Program

Annual Cardholder Training (FY24/25)



Course Objectives

This Training Is Meant To Help You Understand...

- The Purpose Of The District P-card Program
- Restricted Uses Of The P-Card
- Cardholder Responsibilities & Best Practices
- P-Card Program Compliance Rules
- Key Reminders (Including New & Upcoming Changes)
- P-Card Team Contact Information
- Where To Find P-card Resources



P-Card Program Overview



The purpose of the P-Card program is to:

- Provide an efficient, cost-effective and secure method of purchasing and paying for small-dollar as well as high volume purchases.
- Prevent fraud, waste and abuse which is defined as the unnecessary purchase of products, overutilization of services or other practices that directly or indirectly result in unnecessary costs.



Restricted P-Card Purchases



RESTRICTED



- Personal transactions of any kind
- Money orders and Gift Cards
- Alcoholic beverages or any substance, material, or service which violates BCPS policies, laws, or regulations pertaining to BCPS
- Technology equipment without the written approval of IT (computers, software, printers, office machines)
- Grant Funded Purchases – federal, state, or otherwise
- Capital Asset Items – equipment over \$5,000
- Travel-related purchases (hotels, air travel, registration fees, other transportation costs, parking fees)

(Reference P-Card manual for a complete list)



Cardholder Responsibilities & Best Practices*

- Purchasing cards (P-Cards) can only be used for buying District approved items
- Only the person listed on the P-Card is authorized to make purchases using the card
- Cardholders should register for the Bank of America Global Card Access Portal at www.bankofamerica.com/gca to view digital statements, transactions, and account information
- Cardholders must verify that no FL State Sales Tax is being charged for purchases
- Lost/Stolen P-Cards should be reported immediately to PcardNotifications@browardschools.com
- All receipts should be maintained in accordance with the purchasing card policies
- Monthly reconciliation of transactions is required for any month that activity appears on the P-Card statement
- When applicable, Approval(s) must be received before making purchases with the P-Card.

*This list is not inclusive of all cardholder responsibilities and best practices. For a better understanding of all cardholder responsibilities see both the cardholder acknowledgement form (included with the application) and the Pcard program manual.



P-Card Program Compliance Rules

- Each cardholder is required to complete a new application and P-Card training at the beginning of every school year to have P-Cards re-opened for use
- Purchasing cards (P-Cards) should only be used to procure materials and services in accordance with the purchasing card manual, policies and procedures
- New cardholders must complete a new Purchasing Card (P-Card) Application and Cardholder/Approver Acknowledgment Form (**NOTE:** All initials and signatures are required for processing)
- If a P-Card is no longer needed (or the cardholder is changing positions, transferring locations, retiring, or leaving the district) the P-Card should be cancelled by completing and submitting a P-Card Personnel Change Form
- Cardholders are required to reconcile activity, with receipts, sign statements (along with Approver), and submit to the P-Card team electronically to PCardNotifications@browardschools.com by the 15th day of subsequent month to avoid non-compliance and cancellation
- When requested, P-Card information for any purpose is required within 48 hours
- Cardholders are not permitted to divide a purchase into multiple transactions to avoid their single transaction limit



Key Reminders

- **(New!)** Statements & receipts must be submitted electronically via email to PCardNotifications@browardschools.com
- Sales tax is not allowed on P-Cards (card holder is responsible to ask for refund in case sales tax is charged)
- BCPS tax exempt ID is on the card
- Reconciled statements are required by the 15th day of the subsequent month following a statement cycle end
- Cardholder & Approver signatures are required on all monthly reconciled statements



Bank of America	
Account Information	Account Summary
www.bankofamerica.com	Previous Balance \$3.31
Mail Inflation Inquiry to: Bank of America, P.O. Box 100220, Miami, FL 33109-0220	Payments and Other Credits .00
Mail payments to: Bank of America, P.O. Box 10020, Wilmington DE 19860-0020	Purchases and Adjustments 1.38
Customer Service: 1.800.432.1234 (ASK4321234 TTY)	Fees Charged .00
	Interest Charged .00
	New Balance Total \$4.00
	Total Credit Line \$100.00
	Total Credit Available \$96.00
	Cash Credit Line \$100.00
	Portion of Credit Available for Cash \$96.31
	Statement Closing Date 11/7/16
	Days in Billing Cycle 31

REQUIRED

X _____ (Cardholder)
X _____ (Approver)



P-Card Contact Information

CONTACT US



General P-Card Questions/Requests, Form Submissions, Monthly Statement Submissions

Email: PcardNotifications@browardschools.com

P-CARD TEAM MEMBERS:

Laura Rather | Purchasing Agent Specialist | Ph: 754-321-0512 | E: Laura.Rather@browardschools.com

Suzie Louisdhom | Purchasing Card Coordinator | Ph: 754-321-0526 | E: suzie.louisdhon@browardschools.com



P-Card Program Resources



PROCUREMENT & WAREHOUSING SERVICES

HOME FORMS TRAINING QUICK LINKS F.A.Q. CONTACT US + ADD RECENT

Search this site



- **P-Card Resources Included on SharePoint:**

- Purchasing Card Manual
- Purchasing Card Application
- Personnel Change Form
- Registration Instructions - Bank Of America Global Card Access (GCS) Portal
- P-card Team Contact Information

SharePoint Link:

<https://browardcountyschools.sharepoint.com/sites/Procurement/SitePages/Purchasing%20Card%20Program.aspx>

