

Title: UNBC Purchasing Card Guidelines

Procedure Number: CSCM-P22

Date: 01/03/2018

Purpose: Outlining the guidelines for UNBC Purchasing Card use.

References: The UNBC Purchasing Card (the Card) is encouraged to be used for small dollar and one-time material purchases less than a \$1000.00. Cardholders must adhere to the [Purchasing Policy](#).

Guidelines:

1. The Card must only be used to make authorized UNBC purchases within the established Card limits identified on the Cardholder's application form; having a single purchase split into two (2) or more credit card transactions is prohibited.
2. The Card is to be used only by the person whose name appears on the Card (the Cardholder). The Cardholder is not to lend the Card to any other person. The Cardholder is fully responsible for the security of the Card.
3. Cards may be used to purchase goods/services from a research fund; however, if the purchase falls outside of the allowable purchases under the grant, the principal investigator must agree to reimburse the grant fund from their operating or personal funds.
4. Orders for goods can be placed by phone, fax or Internet from domestic and foreign vendors. If the product is being delivered to UNBC, advise Distribution Services once the order has been placed (see #11).
5. The Cardholder must retain the original itemized receipts. The credit card transaction receipt is not an acceptable receipt.
6. Examples of Allowable Transactions include:
 - Memberships and subscriptions
 - Books
 - Goods not available from preferred suppliers (i.e. one-time purchases)
 - Conference registrations
 - Travel expenses – airfare, accommodations, meals, vehicle rental etc. (All travel and car rentals must be on the UNBC Card to benefit from the Card insurance)
 - UNBC vehicle mechanical repairs (at an ICBC accredited repair shop/garage)

7. Restricted Purchases - The Card must not be used for the following:

- Personal expenses
- Cash advances, bank drafts or money orders
- Gift Cards
- Donations and sponsorships
- Gifts of alcohol
- Items that are carried in Central Stores inventory (photocopy paper, fax paper, printer paper, letterhead, envelopes) except when the need for the items arises outside of normal working hours
- Services for which the service is performed on UNBC property (i.e. installation, repair, training)
- Services provided through Facilities and Operations (i.e. construction/building maintenance)
- Items from the UNBC Bookstore or Copy Centre
- Services provided by the Northern Sport Centre
- Courses offered by UNBC both credit and non-credit (Continuing Education)
- Maintenance contracts and lease agreements
- Contracts and payments to individuals and small unincorporated companies (i.e. sole proprietorships) for services
- Equipment rentals exceeding thirty (30) days
- Business cards
- Advertising (social media advertising approval must be obtained from Contracts and Supply Chain Management)
- Catering Services
- Office furniture or equipment that may be contrary to UNBC standards (pre-approval from a Purchasing Agent is required)
- Computer equipment and peripherals of any kind including monitors, printers, and/or software that will be loaded onto a UNBC computer (these purchases must be pre-approved by ITS) with the exception of apps for phones and/or tablets
- Household moving expenses
- Items that are used for any capital project which includes all capital and soft costs
- Restricted or controlled goods (as outlined below)
- Certain goods purchased from foreign locations (as outlined below)

8. Restricted or Controlled Goods - Restricted or controlled goods must be requested using the FAST Web Requisition System. The following goods are examples of unallowable purchases on the Card.

- Controlled substances
- Radioactive and infectious disease materials
- Radiation equipment
- Compressed gases
- Pressure equipment
- Commercial lab alcohols including ethyl alcohol and denatured alcohol

- Laboratory and research animals
- Energy-using products (i.e. furnaces, boilers, heaters, pumps, air conditioners)

9. Foreign Goods - Restricted or controlled goods entering Canada from the USA and International locations are not to be ordered using the Card regardless of the value of the goods.

- Live animals, fish and plants
- Animal embryos and semen
- Human and animal organs, tissues and sera
- Food products (i.e. seeds, soil, lumber, turkey, chicken)
- Fertilizers
- Carbon steel and specialty steel products (i.e. stainless steel wire)
- Textile and apparel products
- Rough diamonds
- Explosives, propellants, safety flares, pyrotechnics
- Precursor chemicals and controlled drugs or narcotics

10. Equipment Assets - UNBC records assets with an acquisition value of \$2500 or greater and any portable items under \$2500 UNBC deems necessary as prone to loss or theft.

11. Shipping Instructions - All goods are to be shipped to Distribution Services – Main Receiving Dock, 3333 University Way, Prince George, BC, V2N 4Z9 and clearly identify the Cardholder name on the box and packing slip.