



# PCard System Departmental Access and Change

ROUTING  
MSC 3890  
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Phone 575-646-2916  
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Instructions: This form is to assign a new Departmental Approver, change a Departmental Approver or change an existing backup Approver for the Departmental Approver. Check the appropriate box above to indicate the type of action desired. **Complete Section 1 for a New Departmental Approver or to change the Departmental Approver.** Attach a listing of all cardholders affected by the change. **Complete Section 2 to assign a Backup Approver or to change a Backup Approver. You must have an Authorization signature in Section 3.** For assistance please call Purchasing and Risk Mgmt Admin 575-646-2916. Send completed form to Purchasing and Risk Mgmt Admin – MSC 3890, by fax to 575-646-3736 or e-mail pcard@nmsu.edu.

## SECTION 1: REQUESTOR INFORMATION

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

## SECTION 2: REQUEST DETAILS

- Add/Remove Approver       Add/Remove Backup Approver

**PRIMARY APPROVER**      Effective Date (mm/dd/yyyy): \_\_\_\_\_

Employee Name: \_\_\_\_\_ Aggie ID: \_\_\_\_\_ Campus Box: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Department/Sub Dept: \_\_\_\_\_

Signature: \_\_\_\_\_

*A subordinate should not be officially assigned as the approver of transactions of their direct supervisor. No one can approve their own transactions.*

If you are replacing an existing Departmental Approver, print their name here: \_\_\_\_\_

**NOTE: You must review and complete the Approver Guidelines (pages 2-3) if you have not already done so.**

Approvers may designate other NMSU employees to fulfill their review and approval responsibilities by Backup Approver. The approver will abide by the actions taken on their behalf by the assigned Backup Approver.

Per the NMSU signature authority policy [http://www.nmsu.edu/~boffice/memos/signature\\_approval\\_policy.html](http://www.nmsu.edu/~boffice/memos/signature_approval_policy.html) Department Heads and other approvers may delegate their signature authority, though not their responsibility, on routine business transactions to permanent or temporary alternates. See BPM Policy on Signature Approval for clarification of acceptable alternates.

**BACKUP APPROVER** (To be used as backup for Departmental Approver)

Employee Name: \_\_\_\_\_ Aggie ID: \_\_\_\_\_ Campus Box: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Department/Sub Dept: \_\_\_\_\_

Signature: \_\_\_\_\_

If you are replacing an existing Backup Approver for the Departmental Approver, print their name here: \_\_\_\_\_

**NOTE: You must review and complete the Approver Guidelines (pages 2-3) if you have not already done so.**

## SECTION 4: OFFICIAL APPROVAL

Printed Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Business Manager/Department Head/Director/Dean

Reset

# PCard System Departmental Access and Change - Approver Guidelines

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Name: \_\_\_\_\_

Aggie ID: \_\_\_\_\_

As an approver of the Procurement Card system you must be aware of the PCard restrictions and authorized transactions. A check list has been provided below with guidelines that you as an approver must review. Please initial beside each item once you have reviewed.

- \_\_\_\_\_ **1. Verify that a valid departmental Index number has been used.**
- \_\_\_\_\_ **2. Verify the transaction amount does not exceed the \$3,000 limit, per transaction per vendor.**
- \_\_\_\_\_ **3. Verify that a valid account code has been used for the item purchased.**
- \_\_\_\_\_ **4. Verify the required entries in the Purpose/Description field provided for each transaction.**
- \_\_\_\_\_ **5. Verify that the receipt images are attached to the correct cardholder statement.**

## \_\_\_\_\_ **6. USE OF CARD**

NMSU is an agency of the State of New Mexico and is exempt from all applicable Federal and most State taxes. New Mexico Gross Receipts Tax (NMGRT) should be paid for services and construction projects only. Verify no tax on tangible property. If state tax is still applied then the cardholder is responsible to annotate this on the work item once it is submitted through the PCard system. Use of account code 760900 for sales tax is recommended.

## \_\_\_\_\_ **7. ALLOWABLE AND NON-ALLOWABLE PURCHASE**

The card shall be used for procuring goods and select services for university use. The purchase of professional services, multi-year service agreements, formal subcontract or expenses related to travel; (except for registration fees) lodging, gasoline and business or travel-related meals are not allowed. Cash advances and personal expenditures are not allowed. The card cannot be used for non-allowable purchases as designated by university policies; refer to the Business Procedures Manual section 4.00.45 and procurement card program non-compliance guidelines. (These are listed below)

## \_\_\_\_\_ **8. Unallowable and Restricted Purchases**

The following are examples of unallowable purchases on any University account. The list should not be considered all-inclusive but merely a guide for purchases that are not allowed.

- Annual fees on credit cards.
- Donations.
- Holiday decorations.
- Alcoholic beverages (Except for resale).
- Tickets for athletic or entertainment events.
- Personal care products.
- Occasion cards, flowers, and gifts (condolence, birthdays, and going away parties) for personal or business occasion/events.
- Compensation for personal service.
- Fines, Penalties.

## PCard System Departmental Access and Change - Approver Guidelines

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Name: \_\_\_\_\_

Aggie ID: \_\_\_\_\_

### 9. Procurement Card Purchases Restrictions

The following purchases may be allowed against a University account but are not allowed to be purchased using a Procurement Card. Procurement cards allow expenditure of University funds prior to review, and are therefore not appropriately used for all transactions. These purchases, if made with a procurement card, may require refund from the vendor or reimbursement by the card holder and tracked as a misuse or decline violation.

1. Expenses associated with lobbying efforts, unless specifically approved for cardholder.
2. Travel-related expenses, i.e. Hotel, car rental, gas, meals, airfare, train fare, bus fare, internet connections, this includes spousal travel as well (travel expense must be audited before being reimbursed under university policy and state law).
3. Registration fees to an NMSU entity (example: Main Campus to a Branch).
4. Business meals, with the exception of approved, internal campus vendors. As of May 2006, the vendors are Corbett Center Student Union (Crossroads, Taos Restaurant, Catering Department, and Java City), Frenger Food Court, Aggie Snack Bar, Golf Course Restaurant, Fulton Center Restaurant, and the Canteen. As vendors on campus change, this rule will continue to apply.
5. Cash Advances.
6. Food products that are served as a meal (this is considered a business meal).
7. Employee Awards directly related to employment, i.e. Plaques, gift certificates, etc.
8. Internal purchases to NMSU other than the approved food vendors.
9. Multi-Year Service Agreements or Formal Contracts.
10. Professional Services for which there must be a contract signed or services from an attorney.
11. Reimbursement for loss or damage to personal items.
12. Taxes on goods; a tax exempt certificate to use with all vendors may be found at <http://www.nmsu.edu/~purchase/taxexemptnotice.htm>.
13. Agency fund purchases.
14. Employee uniforms. See the BPM, Chapter 5 subsection 5A.20 for procedures on uniforms.
15. Equipment equal to or greater than \$1000.
16. Gasoline.
17. Gift cards.
18. Freight on capitalized purchases such as equipment.

10. If unallowable purchases have been made on the card, you as the Approver must decline the transaction with an explanation in the Approver Comments field. This will route the transaction to a fiscal monitor for review. The cardholder will be responsible for reimbursing the University for unallowable items purchased with their PCard.

**By my initials I have acknowledged that guidelines have been provided to me on the use of the Procurement Card Systems and my responsibilities as a Procurement Card Approver.**

## PCard System Departmental Access and Change - Approver Guidelines

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Name: \_\_\_\_\_

Aggie ID: \_\_\_\_\_

List all cardholders that this change will affect.

Aggie ID:	Cardholder:	Department: