



EMORY  
UNIVERSITY

Purchasing Card (P-Card)  
J.P. Morgan Chase VISA

*Frequently Asked Questions (FAQ)*

June 2013



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## *About the Purchasing Card Program*

### **Q1. How do I apply for a University Purchasing Card?**

A1. The appropriate **Chief Business Officer** must approve all requests to obtain a new P-Card. The Cardholder must successfully complete the required **training**, complete the P-Card **application**, and sign the terms and conditions of the **Purchasing Card Cardholder Agreement** prior to receiving a P-Card. Cardholders must also complete a **bi-annual refresher training course** in order to retain use of their P-Cards.

### **Q2. What type of training is required for the Purchasing Card?**

A2. All cardholders, as well as administrators who approve and review Purchasing Card activity, will be required to successfully complete a P-Card and PaymentNet **online training course** and pass a short **quiz**. The online training course will take approximately 45 minutes to complete.

### **Q3. When do I receive my card?**

A3. Upon completion of the required training and the application process, the P-Card Program Administrator will notify you **via email** when your card has arrived. **You** or your departmental **business administrator** may retrieve your card from the receptionist at **1599 Clifton Road**. You will be required to sign, date and supply a **valid Emory ID** to pick up a P-Card.

### **Q4. Who do I notify when transferring from one department or school to another?**

A4. When transferring from one department or school/center to another, you must contact the **P-Card Program Administrator** by email at [pccards@emory.edu](mailto:pccards@emory.edu).



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**Q5. How do I report a lost or stolen card?**

A5. To report a lost or stolen card, you should immediately **call** J.P. Morgan Chase at **1(800)270-7760**. Then, send an **email** to the Emory University P-Card Administrator as soon as possible at **pcards@emory.edu**. You may be required to complete an affidavit for any fraudulent charges.

**Q6. How do I cancel my P-card?**

A6. In order to cancel a Purchasing Card, you will need to contact the **P-Card Program Administrator** by email at **pcards@emory.edu**. Upon confirmation from the P-Card Program Administrator, your account will be deactivated and your School or Department will be advised as such. Please properly **destroy** the P-Card. You are not required to return the card to the P-Card Program Administrator.

## ***Using Your Purchasing Card***

**Q7. What purchases can I make with my Purchasing Card?**

A7. For information relating to allowable purchases using your Purchasing Card, refer to **Purchasing Methods To Use at Emory University on the Procure & Pay section of the Division of Finance website**. Each buying tool is used for **specific types** of purchases. Different benefits and restrictions apply to each.

**Q8. What are my card limits?**

A8. Each Cardholder's specific spend limit can be viewed in PaymentNet. The standard Purchasing Card monthly cumulative spending limit is \$5,000. The standard single transaction limit is \$1,499. Purchases over \$1,499 may not be separated into multiple charges.



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**Q9. How can I request to have my spending limit increased?**

A9. Purchasing Card spending limit increases must go through your school or department Chief Business Officer and must include an explanation of the business purpose for the request.

To request a single one-time transaction limit increase or to request a permanent monthly/single (not to exceed \$4,999) spending limit increase, please contact your Chief Business Officer. In turn, your Chief Business Officer will advise the P-Card Program Administrator of any requests to change your spending limit and the business purpose of the request. The approval of any spending limit increase is at the discretion of the P-Card Administrator.

**Q10. How do I dispute a transaction or a fraudulent transaction?**

A10. Before you dispute any Purchasing Card transaction online, you must first attempt to resolve the issue directly with the merchant. If you are unable to reach an agreement with the merchant for erroneous charges, disputes can be submitted online within the PaymentNet application as follows:

- From the Transaction List, click on the transaction you need to dispute.
- Click "Dispute".
- Select a Dispute Reason from the drop-down list.
- Confirm your E-mail Address and enter the Merchant State, if requested.
- Enter any additional information required and Click "Submit."

**Q11. What do I do if a merchant charges a sales tax to my purchase?**

A11. Before disputing any sales tax charge online, you must first attempt to resolve the issue **directly with the merchant**. If you are unable to reach an agreement with the merchant for erroneous sales tax charges, disputes can be submitted online within the **PaymentNet** application as follows:

- From the Transaction List, click on the transaction you need to dispute.
- Click "Dispute".
- Select a Dispute Reason from the drop-down list.
- Confirm your E-mail Address and enter the Merchant State, if requested.
- Enter any additional information required and Click "Submit."



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**Q12. What type of supporting documentation do I need to retain?**

A12. It is the **Cardholder's responsibility** to retain all original receipts and provide a documented business reason for each Purchasing Card transaction. Documentation will need to be scanned and uploaded within the PaymentNet application.

Documentation can include one or more of the following: Original Invoices, Original Itemized Receipts, Packing Lists, and Email Confirmations.

Documentation must answer these questions:

- ✓ **Who** made the purchase?
- ✓ **What** was purchased?
- ✓ **When** was the purchase made?
- ✓ **Where** was the purchase made?
- ✓ **How much** did the purchase cost?

**Q13. How will my department be charged for my Purchasing Card transactions?**

A13. Your department will be charged for your Purchasing Card transaction(s) based on the **Default Chart of Account** that was entered on your Purchasing Card Application. Purchasing Card transactions are posted to the ledger in Compass on a weekly basis. Questions regarding the validity of your Purchasing Card's Default Chart of Account should be directed to your **Chief Business Officer**.