Guidelines for Procard Users

How It Works...

- If you are not the cardholder or on the blanket permission list you will need to have a One-Time Use Form issued by the cardholder. This can be done by the cardholder online at http://u.tamu.edu/procardpermission or in person at the Business Office.
- Come to the Business Office and ask for the Procard for your department and any retail membership cards (i.e. Sam’s Club).
- Sign your name on the Signature Log to check out the card and any retail membership cards.
- **ONLY YOU** may use the card while it is checked out to you.
- Make your purchase and obtain itemized receipts with no sales tax paid.
  - In the store, tell the cashier you are with Texas A&M and provide the mini tax exempt form in the case containing your Procard. Always check your receipts before you leave the store to make sure there’s no tax on them.
  - Online, you can submit a tax exempt form to the company if they charge tax. Print out your emailed receipt, shopping cart, and/or order confirmation as documentation.
- Come back to the Business Office where you will check in the cards on the Signature Log.
- Submit your receipts at http://u.tamu.edu/procard - you will need to scan the whole receipt and attach to the form. Be aware some vendors print on the front and back of receipts (i.e. Hobby Lobby) and be sure to scan both sides.
- Procards must be returned the Business Office the same day.
  - Should events arise when you will need the card overnight, you should ask in the Business Office beforehand.
- When the Business Office staff reconciles the Procard submissions, **YOU** are responsible for your purchases and providing further information if necessary.
- **All receipts are to be submitted by the end of the week (that Friday by 5 pm).** Failure to do so can cause the card to be suspended until all correct information is turned into the Business Office.

When Purchasing or Submitting Transactions...

- **General**
  - Each transaction is a separate entry. (You will need a submission for each time you swipe the card; please do not combine multiple charges on one submission).
  - Be descriptive but concise about everything you bought. Use laymen’s terms. Instead of saying “Mrs. Baird’s Whole Grain Wheat and Kraft Sharp Cheddar,” simply say, “Bread and cheese.”
  - The purpose of each transaction must illustrate a benefit to TAMU.
  - If your items will be shipped at a later date, please add a note on the submission and contact the Business Office when you receive them. **DO NOT DELAY** turning in receipts because you are waiting on items to arrive – receipts are always due by the end of the week.
  - Do not use acronyms.
- **Food & Alcohol**
  - For business meals, you must provide the following: **WHO** attended the meal, **WHAT** was discussed, **WHEN** and **WHERE** the meal occurred, and **WHY** the discussion was relevant and beneficial to Texas A&M.
  - Alcohol must be paid on an account that allows it (usually gift or continuing education accounts).
• **Gifts & Promotional Items**
  - Anything given to a specific person is considered a gift.
  - You must obtain the recipient’s name and UIN if they are TAMU affiliated.
  - Gifts can only be purchased and reallocated to a GIFT account.
  - Anything that is given at random or is intended to promote the College is considered a promotional item. You do not need to document names and UINs.

• **Registrations, Memberships, & Subscriptions**
  - Note that it is a University Best Practice that individual professional memberships should NOT be purchased on the Procard.
    i. If you need to purchase an individual membership, please do so via a personal payment method and then fill out a reimbursement request in the Business Office.
  - Memberships/subscriptions to databases, stores, etc. (i.e. not a professional membership) can be purchased on the Procard.
  - Conference registrations should only be purchased on the Procard if the event is taking place in Bryan/College Station area. If there is any travel involved with the conference, it must be purchased on your travel card.
  - The beginning and ending dates of events or memberships should be included, and also who is receiving or attending.
  - The ending date of these events is the received date. For example, a conference that is purchased on July 1 and runs from July 25-28 would have an order date of July 1 and a received date of July 28.

• **Advertising**
  - A copy of the ad must be attached to the receipts, and the running dates of the ad must be listed on the submission form.

**Items NEVER allowed on the Pro-Card...**

- Sales Tax
- Travel expenses
- Donations, crowdfunding campaigns, etc.
- Personal items
- Fuel for state owned vehicles
- Cash advances or money orders
- Capital inventory (single items over $5,000) or hazardous material

If buying any of the following items, please contact OIT (helpdesk@arch.tamu.edu) **BEFORE** purchasing:

<table>
<thead>
<tr>
<th>Software applications</th>
<th>Laptops and desktop computers</th>
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<tbody>
<tr>
<td>Cloud services/storage (e.g. Dropbox)</td>
<td>Tablets</td>
</tr>
<tr>
<td>Large monitors or TVs</td>
<td>Raspberry Pi (mini computer)</td>
</tr>
<tr>
<td>Printers</td>
<td>Computer parts (RAM, CPU, hard drive)</td>
</tr>
<tr>
<td>NAS/SAN devices (Drobo, Synology, etc.)</td>
<td>Network devices (modem, router, etc.)</td>
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**Pro-Card Contacts in the Business Office, Langford A206**

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