

# Department of Plant & Soil Sciences

## Procard Ordering Instructions

### Check Out Procard Guidelines and Spending Limits *Before* Purchasing:

1. Do **not** purchase items/services restricted under Procard regulations:
  - Consult the **Procard Manual** (distributed at Procard User Class or online at <http://www.umass.edu/procurement/Procard/ManualIndex.html> , or check with your Bookkeeper). Remember, **NO TRAVEL, GAS, DINING**, etc.
2. Purchase from Vendors that have contracts with the University whenever possible:
  - Check out <http://www.umass.edu/procurement/commcont.html> or <http://www.mhec.umass.edu> or ask your Bookkeeper. **Doing so may save you money!** Ask each vendor that you purchase from if they have contract pricing with UMass. Note: Purchasing from Staples is **not** allowed unless it is a justifiable emergency need.
3. Be sure to **tell the vendor** that the purchase is TAX EXEMPT (Tax Ex. # is on your Procard)
4. Do **not** purchase **equipment** unless you are authorized to do so
5. Do **not exceed** the Procard **spending limits** authorized on your card

### Unless a Reallocation is Needed, Keep *All* Monthly Procard Order Materials Together and Turn Them In Promptly After You Get Each Month's Statement

1. Keep all receipts, invoices, and packing slips together in a secure place and turn them in **monthly** to your Bookkeeper along with your other Procard papers:
  - If you buy an item in a store, **save the receipt**.
  - If you phone in an order, **ask for an invoice to be faxed/sent to you ASAP**.
  - **If your invoice/receipt is not itemized, please provide additional details**.
  - If you have **lost** a receipt or invoice, you **must** try to get another one from the vendor. If you can't get a replacement, **you must fill out a *Procard Missing Itemized Receipt/Documentation Affidavit***, and turn it in with your other monthly Procard materials.
2. Send in any request for a **fund reallocation** to your Bookkeeper **immediately**:
  - Fill out a Departmental ***Procard Order Reallocation Form*** and send it to your Bookkeeper **immediately** after purchase, **do not hold it to turn in with your monthly Procard papers**. Note: You **CAN NOT** reallocate a Procard purchase to a Hatch/Multi-State account or transfer a charge on Hatch/Multi-State to another account.
3. Be sure to get packing slips for all delivered items and turn them in with your monthly Procard papers
4. **Fill in your monthly UMass Procard Log**, and turn it in with your other monthly papers:
  - We suggest that you fill in each order on the log as you phone it in or as soon as you return from a store. We also suggest that you keep a copy of your monthly log for your own records.
5. When you receive your monthly statement in the mail, **check it** for accuracy, **sign and date** the statement, and send it (in the grey envelopes provided) to your Bookkeeper along with your **completed** monthly log and all receipts, invoices, packing slips, and Missing Receipts Forms