Procard – Quick Reference Tool

Contacts –

Questions about training, applications, exception requests, changes, transactions declines should be referred to

- Holly Lankowski – Procard Program Manager – lankowski@admin.umass.edu – 413.545.1748 or
- Rebecca Schwartz – Procard Program Administrative Support – rschwartz@admin.umass.edu – 413.577.0638 or
- Gary Duggan – Travel Card Program Manager (and Procard Back-Up) – gsduggan@admin.umass.edu – 413.545.6231

Questions about records retention or audit responses should be directed to

- Angel Falcon – Procard Auditor – alf@admin.umass.edu or 413.545.1429

Web Links –

Procard Home Page – http://www.umass.edu/procurement/Procard/procard_index.html
Procard Forms – http://www.umass.edu/procurement/Procard/Forms.htm
Procard - Restricted Commodities – http://www.umass.edu/procurement/Procard/procard.html#_Toc404411348
Procurement – Commonly Used Contracts – http://www.umass.edu/procurement/commcont.html
Sales Tax Exemption Certificate – Form ST-5 - Sales Tax Exempt Purchaser Certificate Form
Travel Card Program – http://www.umass.edu/travel/corpCard.html

How to Reminders –

Report a Card Lost/Stolen –

- Report a lost or stolen Procard to Citibank immediately at 1-800-248-4553 (24 hours/day, 7 days/week)
- When you call, review any recent activity to be sure it is legitimate
- Record the date and time of your call to Citibank
- If you are not sure where your card is, assume it is lost or stolen

Cancel/Suspend a Card –

- Email the Procard Manager to request that your Procard be canceled and as of what date if you are terminating your employment or transferring to a new department
- Cut up or shred your card
- Finalize your last statement or forward any pending receipts to your records manager to complete
- Contact the Procard Manager for advice on any type of extended leave of absence (i.e., sabbatical, military, personal, sick).

Dispute a Charge –

- You should try to work out any dispute with the vendor (most are resolved in this manner)
- If credit is given ensure it is applied to your Procard
- If you are unable to resolve the issue with the vendor, then email the Procard Manager to file a dispute with Citibank
  - These disputes must be made within 60 days of the transaction date

Grant Account – Contacts and Reference Documents –

Contact your specific Grant Accountant or Denise Storm - dstorm@admin.umass.edu – 413.545.7011.

- Guidelines for Charges to Sponsored Projects Funded by Federal Agencies

Ideas for Procard use –

- Advertising
- Auxiliary Services Catering
- Books
- Lab Supplies
- Memberships
- Postage (USPS, UPS, Fedex)
- Printed Media Subscriptions
- Take Out Food for Meetings/Events