Pcard Guide

All Pcard purchases should be retained by the University. Pcard purchases should not be for personal gain, not require a contract (additional terms and conditions) and not be over $5,000. Purchases over $5,000 must be processed through Purchasing. Contact an Acquisition Manager for more information on purchases over $5,000.

Yes List

- **Abstract/Publishing Fees**
  - These fees are allowable for business purposes only.
- **Appliances**
- **Application/Submission Fees**
  - These fees are allowable for business purposes only.
  - Prohibited fees include but are not limited to fees for certification, licensure, Visas, etc.
- **Binding**
  - Binding of materials retained by the University is allowable on the Pcard.
- **Books**
  - Books retained by the University are allowable on the Pcard.
- **Bottled Water Service**
  - This includes large jugs of water for beverage units, not individual sized bottles of water.
  - Rentals of the beverage units are not allowable on the Pcard.
  - Any and all terms and conditions relating to the delivery of the water product must be approved by Purchasing.
  - Water should be used primarily for visitors and available in a public area.
- **Cell Phones**
  - Cell phones, excluding disposable cell phones, are allowable on the Pcard.
- **Cell Phone/Smart Phone Service**
  - See Wireless policy for more information.
- **Chemical Supplies**
- **Classroom Materials**
- **Clothing/Apparel**
  - Clothing rentals are not allowable.
  - Clothing/apparel purchases are only allowable when retained and required by the University.
  - Examples include but are not limited to scrubs, lab coats, security uniforms, etc.
- **Coffee Service**
  - Rentals of the beverage units are not allowable on the Pcard.
  - Any and all terms and conditions relating to the delivery of the coffee product must be approved by Purchasing.
- **Coffee Supplies**
  - Examples include but are not limited to coffee, coffee filters, creamer, sugar, tea, cocoa, stirrers, etc.
- **Computer Parts/Peripherals**
  - See HSC, Norman or Tulsa IT websites for more information including any required approval processes.
  - Additional and/or extended warranties not included in the cost of the product cannot be paid on the Pcard.
  - Any and all terms and conditions relating to the purchase must be approved by Purchasing.
- **Computers**
  - See HSC, Norman or Tulsa IT websites for more information including any required approval processes.
Additional and/or extended warranties **not** included in the cost of the product **cannot** be paid on the Pcard.

Any and all terms and conditions relating to the purchase must be approved by Purchasing.

- **Conference Registrations**
  - If paying for the registration the day of the event or after the event has occurred then only a receipt or invoice is required.
  - Prepaid conference registrations are allowable Pcard expenses with the following in writing from the conference host.
    1. The conference host requires payment in advance and/or does **not** accept a Purchase Order.

    *If the conference host does **NOT** require payment in advance and/or accepts Purchase Orders, then ALL of the following must be in place.*

    1. The conference host will apply a discount for early registration to the conference.
    2. The conference host will allow for substitutions of participants.
    3. If the CONFERENCE IS CANCELLED the conference host will refund 100% of the registration cost.

  - Additional charges such as CME credits, cancellation fees, additional meals, banquets, golf tournaments, etc. must be paid for separately and **not** on the Pcard.
  - Please note that as a state agency we are prohibited from paying penalties or cancellation fees whether the conference is cancelled OR you cancel.

- **Copy/Print Shops**
  - Contact Printing Services for more information.

  *“When a University department purchases such products or services, the University department must allow the related Auxiliary Enterprise or Service Unit first opportunity at the transaction. Such purchases may be awarded to outside vendors only upon sufficient justification or upon refusal by the Auxiliary Enterprise or Service Unit”* (Regents’ Policy Manual 4.11.6).

- **Copyright Fees**
- **Décor**
  - Décor is allowable when the items are retained by the University.

- **Educational Supplies**
- **Electrical Supplies**
- **Electronics**
- **Equipment**
- **Food**
  - Food is only allowable on the Pcard when purchased for lab usage.

- **Frames**
  - Frames are allowable on the Pcard if they are retained by the University.
  - Additional charges for customization, framing, set-up fees, etc. are **not** allowable on the Pcard.

- **Freight**
  - Also see Shipping.
  - A listing of contracted vendors can be found in the Contracts section of the Purchasing web site.

- **Furniture**
  - A listing of contracted vendors can be found in the Contracts section of the Purchasing web site.
  - Installation of the furniture is **not** allowable on the Pcard.

- **Gases**
  - Gases can be purchased for medical and/or lab usage.
  - Fuel for vehicles **cannot** be purchased on the Pcard.
The rental of cylinders cannot be purchased on the Pcard.

- **Janitorial Supplies**
- **Lab Equipment and Supplies**
  - See the Contracts section of the Purchasing web site.
- **Landscaping Supplies**
- **Laundry Service**
  - Any and all terms and conditions relating to the purchase must be approved by Purchasing.
- **Listing/Record Fees**
- **Mailing List**
  - The postage and/or rental of mailing lists are not allowable on the Pcard.
- **Notary**
- **Notary Renewal**
- **Office Supplies**
  - See the Contracts section of the Purchasing web site.
- **Pagers**
- **Parts**
  - This includes parts for airplanes, vehicles, computers, equipment, etc.
- **Photography/Photos**
  - Additional service fees such as sitting fees or photo finishing are not allowable purchases on the Pcard.
- **Physician Credentialing**
- **Pike Pass**
- **Plumbing Supplies**
- **Publishing/Submission Fees**
  - These fees are allowable for business purposes only.
  - Prohibited fees include but are not limited to fees for certification, licensure, Visas, etc.
- **Registrations**
  - See Conference Registrations.
  - Registrations for employee training or courses are not allowable purchases on the Pcard.
- **Resale Items**
  - Items purchased for the purpose of resale (goods sold to internal departments or external vendors) are allowable on the Pcard if they are in compliance with the Pcard Guide.
- **Scientific Equipment and Supplies**
- **Shipping**
  - Shipping charges that are included in your product invoice are allowable on the Pcard.
  - The total cost of the product including shipping must not exceed $5,000.
  - Shipping through a contracted vendor is allowable on the Pcard. See Shipping for information on setting up an account on the University contract.
  - Third party shipping is not an allowable expense on the Pcard.
- **Smart Phone**
  - Examples of a smart phone include but are not limited to BlackBerry, Android, iPhone, etc.
  - See the Wireless Policy for more information.
- **Software**
  - Any and all terms and conditions relating to the purchase must be approved by Purchasing except if the software purchase is under $5,000 and is a click-through agreement or shrink wrapped.
  - See HSC, Norman or Tulsa IT websites for more information including any required approval processes.
  - Additional and/or extended warranties not included in the cost of the product are not allowable on the
Pcard.

- **Software License**
  - Any and all terms and conditions relating to the purchase must be approved by Purchasing except if the software purchase is under $5,000 and is a click-through agreement or shrink wrapped.
  - See HSC, Norman or Tulsa IT websites for more information including any required approval processes.
  - Additional and/or extended warranties **not** included in the cost of the product **cannot** be paid on the Pcard.

- **SSL Certificates**
  - SSL certificates can only be paid for up to one year at a time.

- **Subscriptions (Hardcopy)**
  - Subscriptions are allowable on the Pcard when:
    1. Mailed to a University address
    2. Paid for a MAXIMUM of one year in advance
    3. Renewed less than six weeks prior to expiration date
  - Medical subscriptions that meet criteria 1 and 2 above may be renewed six months prior to the expiration date.

- **Subscriptions (Online)**
  - Online subscriptions are allowable if they are transferable to another employee or for multiple users and meet the same criteria as hardcopy subscriptions.
  - Any and all terms and conditions relating to the purchase must be approved by Purchasing.

- **Teaching Supplies**

- **Uniforms**
  - Uniforms are allowable when retained and required by the University.
  - Clothing/uniform rentals are **not** allowable on the Pcard.

- **Video Conferencing Equipment**

- **Videos**

- **Webinars**
  - If paying for the webinar at the time of the event or after the event has occurred, then only a receipt or invoice is required.
  - Prepaid webinars are allowable Pcard expenses with the following in writing from the conference host.
    1. The conference host requires payment in advance and/or does **not** accept Purchase Orders.

    **If the conference host does NOT require payment in advance and/or accepts Purchase Orders, then ALL of the following must be in place.**

    1. The webinar host will apply a discount for early registration.
    2. **If the WEBINAR IS CANCELLED** the webinar host will refund 100% of the registration cost, reschedule the event or provide attendees with a recorded version of the webinar.
No List

- **Advertising/Job Posting**
  - Contact an Acquisition Manager prior to placing an order.

- **Alcohol**
  - Purchases of all types at liquor or spirit stores are not allowable on the Pcard.
  - Alcohol/spirits of any type are not allowable on the Pcard.
  - Examples include but are not limited to beer, wine, spirits, cooking wine, etc.

- **Ammunition**
  - See Regents’ Policy (3.1.12).

- **Awards**
  - Items not retained by the University are not allowable on the Pcard.
  - Examples include but are not limited to framed certificates, plaques, trophies, etc.

- **Cash**
  - Examples include but are not limited to money orders, wire transfers, travelers’ checks, ATM withdraws, etc.

- **Certification/Accreditation**
  - Examples include but are not limited to CME credits, CPR certification, medical certification, academic certification, etc.

- **Construction/Renovation**
  - Contact an Acquisition Manager for more information.

- **Contracts/Agreements**
  - Contracts/agreements are not allowable on the Pcard.
  - Examples include but are not limited to third party shipping, installation, photography, etc.
  - Contact an Acquisition Manager for more information.

- **Domain Names**
  - Domain names require additional review.
  - A domain name is considered a rental which may include a contract or service agreement.
  - Contact an Acquisition for more information.

- **Employee Testing**
  - Examples include but are not limited to academic exams, board exams, certification exams, eye exams, hearing tests, etc.

- **Employee Training**
  - Examples include but are not limited to academic courses, certification training, computer programming classes, CPR training, etc.
  - Beware of events that may appear to be conferences but contain “course” or “training” in the registration information.

- **Entertainment/Events**
  - Examples include but are not limited to additional meals at conferences, banquets, DJ’s, clowns, golf tournaments, musicians, concerts, movies, sporting events, theatre events, etc.
  - Contact an Acquisition Manager for more information.

- **Firearms**
  - See Regents’ Policy (3.1.12).

- **Food**
  - Food is not allowable for human consumption.
  - Examples of non-allowable food purchases include but are not limited to sandwiches, donuts, candy, individually bottled beverages, etc.
• **Foreign Vendors**
  - Payments to foreign vendors (including purchases shipped and/or billed from a foreign country) are not allowable transactions on the Pcard without prior approval from the Pcard Team. Questions relating to foreign vendors should be directed to Financial Support Services for Norman and the Accounts Payable Management Team for HSC.

• **Framing**
  - This is a service and should not be paid on the Pcard.
  - Contact an Acquisition Manager for more information.

• **Fuel**

• **Gift Cards/Gift Certificates**
  - Further clarification for the HSC campus can be found in the [Research Incentive Gift Cards Policies and Procedures](#).

• **Gifts**
  - Items not retained by the University are not allowable on the Pcard.
  - Examples include but are not limited to awards, promotional items, trophies, framed certificates, greeting cards, etc.

• **Greeting/Seasonal Cards**
  - Greeting/Seasonal cards are not an allowable expense on the Pcard because they are considered gifts.

• **Insurance**
  - Insurance is not an allowable charge on the Pcard because it is a service and requires a contractual agreement.

• **Internet Services**
  - Examples include home or remote internet services.

• **Labor/Maintenance/Repair**
  - Examples of these types of services include but are not limited to auto maintenance, calibration, estimates, installation, measurement, etc.
  - Contact an Acquisition Manager for more information.

• **Late Fees**
  - See OSF guidelines.

• **Leases**
  - See Rentals.
  - Contact an Acquisition Manager for more information.

• **Licenses**
  - Examples include but are not limited to medical, DEA, CPA, or state required licenses.

• **Lodging**
  - Examples include but are not limited to hotels, motels, dormitories, etc.

• **Memberships**
  - All memberships, both institutional and individual, should be processed through HSC Accounts Payable and Financial Support Services at Norman.

• **Personal Expenses**
  - Section 513- Approval of Personal Financial Transactions states, “Employees, whether faculty, staff or students, shall not approve any transaction that impacts themselves financially, whether directly or indirectly. This includes, but is not limited to, salary increases, special payments, travel, reimbursements, or other supplemental payments or non-cash fringe benefits. Such transactions shall only be approved in writing by a University employee who is in a greater level of institutional authority and who is completely independent from the individual receiving the benefit or reimbursement” (The University of Oklahoma Health Science Center Administrative Policies: Adopted 2-9-04).
• **Postage Stamps**  
  o See Postage Policy.

• **Prepayment**  
  o Examples include but are not limited to phone cards and photo credits.  
  o Prepaid Conference Registrations may be allowable. See Conference Registrations for further information.

• **Printers**  
  o The University has a mandatory contract for copiers/printers. Please contact Printing Services.

• **Radioactive Materials**

• **Recruitment/Promotional Items**  
  o Recruitment/promotional items are defined as items given away to participants or in an effort to recruit participants.  
  o Examples include but are not limited to key chains, stickers, magnets, pens, cups, T-shirts, hats, etc.

• **Rentals**  
  o Examples include but are not limited to cylinder rental, booth rental, equipment rental, storage unit rental, rental of mailing lists, etc.  
  o Contact an Acquisition Manager for more information.

• **Royalties**

• **Services**  
  o Examples include but are not limited to alarm service, calibration, consulting services, embroidering, engraving, extermination services, framing, installation, labor, laminating, lawn services, pest control, photo-finishing, repairs, set-up fees, web/domain hosting, etc.

• **Testing**  
  o See Employee Testing.

• **Third Party Shipping**  
  o See Shipping for more information.

• **Tobacco**

• **Travel**  
  o Examples include but are not limited to airline tickets, bus tickets, car rentals, limousine service, taxi service, hotel lodging, etc.

• **Tuition**  
  o See Employee Training.

• **Warranties**  
  o Contact an Acquisition Manager for more information.