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Resources for Procurement Card Cardholders and Approving Officials [1]

Resources

The PSC website [2] contains information on procurement policies, procedures, and instructions, including:

- Procurement Card Handbook [3]
- Procurement Rules [4]
- IT Procurement [5]
- How to Buys by commodity [6]

Percipio Courses

- CU: Procurement Card Cardholder Training [7]
  - Learn about the policies and procedures governing the use of the procurement card, as well as about your individual responsibilities as a cardholder.
- CU: Procurement Card Approving Official Training [8]
  - In this course, you will learn about your responsibilities as an approving official (AO) for the procurement card program, and how to fulfill those responsibilities effectively.

Procurement Card Application

An application for the Procurement Card can be submitted in Concur Request [9]. Online training is required before the Procurement Card can be issued. For more information, please refer to the PSC's Commercial Card [10] information page.

Approving Officials (AOs)

An application to be an Approving Official [11] can be submitted in Concur Request. [12] Online training is required before the Approving Official access can be granted. For more information on the responsibilities of an Approving Official, please refer to the Procurement Card Handbook [3].

Approving Official changes and updates [13] can be submitted using the appropriate Concur Request form as well.

Expense Delegates

Expense delegates can help reconcile your Procurement Card expenses – as well as your travel expenses – on your behalf. Step-by-Step instructions are available for identifying your delegates. [14]

Cardholders are ultimately responsible for accurate and timely expense reconciliation, even when expense delegates are assisting with the process. Only the cardholder can submit expense reports to their Approving Official.

Reconciling Your Procurement Card Expenses

Step-by-Step Guides are available on the Concur – Reconciling Procurement Card Learning Resources [15]page.
How-to pages include: :

- Creating a New Procurement Card Report [16]
- Adding an Expense [17]
- Submitting an Expense Report [18]

CU Marketplace

CU Marketplace [19] is the University's preferred method of procurement for all purchases.

Finance Procedural Statements

All Procurement Card purchases should follow the guidance provided in the relevant Finance Procedural Statements [20] found on the Office of University Controller's website.

Resources

- Procurement Card Handbook [3]
- Travel Card Handbook [21]
- Expense System Certification Statements [22]
- IT Procurement [5]

Related Articles

- Commercial Cards: Fraudulent Charges on a Commercial Card [23]
- Concur Expense: Creating a New Procurement Card Report [24]
- Concur Expense: Adding an Expense [25]
- Concur Expense: Submitting an Expense Report [26]
- Concur Request: Applying for a Procurement Card [27]
- Concur Request: Procurement Card Updates [28]
- Concur Request: Suspending, Canceling, or Reinstating a Procurement Card [29]
- Concur Request: Applying to be an Approving Official [11]
- Concur Request: Approving Official Updates [13]

SEARCH ALL ARTICLES [30]

Policies and Procedures

- PSC Procedural Statement: Payment Voucher/Authorization [31]
- PSC Procedural Statement: Cash Advances [32]
- Procurement Rules [4]
- Finance Procedural Statement: Business Expense Substantiation & Tax Implications [33]

VIEW ALL PROCEDURES [34]

Source URL:https://www.cu.edu/psc/resources-procurement-card-cardholders

Links
[1] https://www.cu.edu/psc/resources-procurement-card-cardholders [2] https://www.cu.edu/PSC
[3] https://www.cu.edu/psc/procurement-card-handbook [4] https://www.cu.edu/psc/procurement-rules
[5] https://www.cu.edu/psc/procurement/sourcing/it-procurement
[6] https://www.cu.edu/psc/procurement/sourcing/commodity-listing
[7] https://share.percipio.com/cd/LxGgMgW8P [8] https://share.percipio.com/cd/uZuJ27v4w
[9] https://pschelp.cu.edu/s/topic/0TO8b000000PAoOGAW/concur-request
[10] https://www.cu.edu/psc/paying/commercial-card-program [11] https://pschelp.cu.edu/s/article/Concur-Request-Applying-to-be-an-Approving-Official
[12] http://pschelp.cu.edu/s/topic/0TO8b000000PAoOGAW/concur-request
[13] https://pschelp.cu.edu/s/article/Concur-Request-Approving-Official-Update
[14] https://pschelp.cu.edu/s/article/Concur-Expense-Identifying-Delegates-in-Concur
[15] https://pschelp.cu.edu/s/topic/0TO8b000000ZFtOGAW/concur-expense
[16] https://pschelp.cu.edu/s/article/Concur-Expense-Creating-a-New-Procurement-Card-Report
[17] https://pschelp.cu.edu/articles/Knowledge/Concur-Expense-Adding-an-Expense
[18] https://pschelp.cu.edu/articles/Knowledge/Concur-Expense-Submitting-an-Expense-Report
[19] https://www.cu.edu/psc/get-help/learning-resources/cu-marketplace
[20] http://https://www.cu.edu/controller/procedures/finance-procedural-statements
[21] https://www.cu.edu/psc/travel/you-travel/travel-card [22] https://www.cu.edu/psc/cr
[23] https://pschelp.cu.edu/s/article/Concur-Expense-Fraudulent-Charges-on-a-Commercial-Card
[24] http://pschelp.cu.edu/s/article/Concur-Expense-Creating-a-New-Procurement-Card-Report
[25] http://pschelp.cu.edu/articles/Knowledge/Concur-Expense-Adding-an-Expense
[26] http://pschelp.cu.edu/articles/Knowledge/Concur-Expense-Submitting-an-Expense-Report
[27] https://pschelp.cu.edu/s/article/Concur-Request-Applying-for-a-Procurement-Card
[28] https://pschelp.cu.edu/s/article/Concur-Request-Procurement-Card-Updates
[29] https://pschelp.cu.edu/s/article/Concur-Request-Suspending-Canceling-or-Reinstating-a-Procurement-Card [30] https://pschelp.cu.edu/s/ [31] https://www.cu.edu/psc/policies/psc-procedural-statement-payment-voucher-authorization [32] https://www.cu.edu/psc/procedures/cash-advances
[33] https://www.cu.edu/controller/procedures/finance-procedural-statements/finance-procedural-statement-business-expense [34] https://www.cu.edu/psc/procedures