

Date: July 1, 2026

To: All UMBC Purchasing card Holders & Supervisors

From: David Clurman, Purchasing Card Program Administrator
Ann Fusselbaugh, Assistant Purchasing Card Program Administrator

Re: Important Reminders about the P-card Program

As we begin a new academic year, we would like to share several important reminders and best practices with all P-card holders and supervisors.

1. P-card reconciliations are due monthly, within 30 days after the end of the billing cycle) even when there is no card activity. If there are no transactions, you must download a blank PeopleSoft Transaction Log and upload that with the Monthly Reconciliation Certification Form.
2. Be sure to attach the US Bank statement, the PeopleSoft Transaction Log, and all supporting documents (receipts, meal pre-approval forms, etc.) to the Monthly Reconciliation Certification Form so that all required records are maintained in a single file.
3. DocuSign and P-card Box folders aren't linked. Once the Monthly Reconciliation Certification has been signed by both the cardholder and P-card supervisor, it must be downloaded from DocuSign and uploaded to the Box folder assigned to the cardholder.
4. When using a P-card for hotels, ensure that you are including the Concur request number in the Business Purpose field of your transaction log.
5. Purchases from eBay, or other reseller sites, must be pre-approved by Procurement prior to the purchase. Ensure that you keep a copy of Procurement's approval with your P-card documentation.
6. Ensure that you change the *Business Purpose / Description* field on the PeopleSoft Transaction Log to state the business purpose of the purchase.
7. Ensure that the completed Monthly Reconciliation Certification Form is stored in the Box folder that Procurement has assigned to the cardholder.
8. Review resources for common questions:
 - a. [Q&A guide](#)
 - b. [P-card Quick Reference Guide](#)
9. Failure to complete monthly tasks in a timely manner may result in card suspension for 30 days or until all documentation is completed, whichever is longer.

10. Monthly credit limits are set in multiples of \$5,000 (\$10,000, \$15,000, \$20,000, etc.). When requesting a change in credit limits through a [Maintenance Request](#), please use one of those amounts.
11. Cardholders are not to split charges to get under the per transaction limit (\$5,000). If a purchase totals more than \$5,000 the department is required to submit a requisition in [PAW](#) to create a purchase order.
12. Become familiar with [guidance](#) around ordering food or catering. P-cards can only be used for caterers, not restaurants. Remember that while P-cards can work for [ezCater](#) all university policies must still be followed.
13. P-cards cannot be used for gift cards, gifts, personal purchases, alcohol, entertainment/movie theaters, restaurants, office decorations, trains/airlines, travel agents, personal services, furniture (except MCE up to \$5,000), or money orders/wire transfers.
14. Expenses to be reimbursed by Foundation funds should not be paid for with the P-card. Follow the [USMF Policies and Procedures](#) guide for reimbursement.
15. All new and renewal software purchases, subscription, cloud-based and technology services purchased with the P-card it must first go through the UMBC cloud/software review process before the purchase is made.
16. With limited exceptions, only Procurement and Office of General Counsel have signature authority to execute contracts and agreements on behalf of the University. Employees should not sign vendor agreements, contracts, terms and conditions, or other legally binding documents, as doing so may result in personal liability. It is permissible for staff to sign agreements that are internal to UMBC (ex. room reservations).
17. Remember to provide suppliers with the [Sales and Use Tax Exemption Certificate](#) to remove Maryland sales tax.
18. For resources, please refer to our website: <https://procurement.umbc.edu/p-card/>.
19. If you still have questions about P-card use, please ask [through this form](#).