

UM Policies: Purchasing Card Policies

UNIVERSITY
OF MIAMI



Last Update: 21 May 2012

Purchasing Card Policies

Purchasing Card

Policy last updated in April 2009

Purpose:

The Corporate Card Office is committed to providing the best possible service to all campuses of the University of Miami. To that end, we offer an innovative payment tool in the form of a purchasing card (PCard), which is designed to allow departments more control over routine, small-dollar purchases.

[Corporate Cards](#)

Purchasing Card Program

Policy last updated in October 2010

Purpose:

The PCard is a corporate credit card procurement tool that offers an alternative to the existing University procurement processes. It provides an extremely efficient and effective method of purchasing and paying for goods. There are two types of PCards available: the Individual PCard, which is intended for transactions of \$2,000 or less and the Departmental PCard which is intended to cover recurring and routine departmental utility bills.

[Purchasing Card Program](#)

BSJ Purchasing Policies

BSJ-101 Change or Cancellation of an Order

Policy last updated: 10/2010

Purpose:

To provide a procedure for the change or cancellation of a Purchase Order (PO).

[BSJ-010 Change Or Cancellation Of An Order](#)

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BSJ-015 Competitive Bids Written and Verbal

Policy last updated: 11 July 2011

Purpose:

To define when competitive bids are required by the Purchasing Department for the purchase of goods and services.

[BSJ-015 Competitive Bids. Written & Verbal](#)

BSJ-020 Computer and Telecommunication

Policy last updated: 2 April 2009

Purpose:

To emphasize University policy with regard to propriety in the acquisition of computer goods and/or services.

[BSJ-020 Computer And Telecommunication](#)

BSJ-025 Conflict of Interest

Policy last updated: 11 July 2011

Purpose:

To clarify a conflict of interest as it relates to University business matters.

[BSJ-025 Conflict Of Interest](#)

BSJ-028 Contracting Requirements

Policy last updated: 11 July 2011

Purpose:

To define the contracting requirements for E-commerce, Websites, Data Banks and consulting agreements to review billing practices.

[BSJ-028 Contracting Requirements](#)

BSJ-030 Consultant Services

Policy last updated: 11 July 2011

Purpose:

To set forth the methods of procurement, payment and the determination of propriety for the engagement of consultant services.

[BSJ-030 Consultant Services](#)

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BSJ-040 Demonstration or Trial of Equipment

Policy last updated: 11 July 2011

Purpose:

University personnel must use a Purchase Requisition to obtain equipment on a trial basis. The Purchasing Department will issue a \$1.00 Purchase Order (PO), which will state the terms, conditions, and time limits of the trial period. After Purchasing processes the PR-1, the equipment will automatically be listed on the capital equipment rolls, thereby insuring the equipment against loss or damage.

[BSJ-040 Demonstration Or Trial Of Equipment](#)

BSJ-050 Emergency Purchase Order

Policy last updated: 11 July 2011

Purpose:

To provide a method for emergency purchases and to set forth the conditions under which such purchasing is approved.

[BSJ-050 Emergency Purchase Order](#)

BSJ-060 Establishing a Standing Purchase Order

Policy last updated: 11 July 2011

Purpose:

To provide a vehicle for the purchase of ongoing services and/or maintenance.

[BSJ-060 Establishing A Standing Purchase Order](#)

BSJ-075 Misrepresentation by a Vendor

Policy last updated: 11 July 2011

Purpose:

The University may take legal action against a vendor if he/she has misrepresented goods or services which the University purchased.

[BSJ-075 Misrepresentation By A Vendor](#)

BSJ - 110 Purchasing Authority - Overseas

Policy last updated: 2 February 2005

Purpose:

To align University policy with maritime law and provide a vehicle for overseas purchases.

[BSJ-110 Purchasing Authority - Overseas](#)

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BSJ-115 Purchasing and Contracting Authority

Policy last updated: 6 October 2011

Purpose:

This policy establishes University requirements for review and execution of purchase agreements and contracts.

[BSJ-115 Purchasing and Contracting Authority](#)

BSJ-120 Unauthorized Purchase

Policy last updated: 31 August 2010

Purpose:

To provide examples of unauthorized purchases and inform the proper way of obtaining goods and services.

[BSJ-120 Unauthorized Purchases](#)

BSJ-130 Record Retention

Policy last updated: 4 August 2010

Purpose:

To set forth the criteria, types of records and procedures for the retention of purchasing documents.

[BSJ-130 Record Retention](#)

BSJ-140 Shipping Household Goods/UM Expense

Policy last updated: 31 August 2011

Purpose:

To set forth the special criteria and procedures applied to the shipment of household goods.

[BSJ-140 Shipping Household Goods/Um Expense](#)

BSJ-145 Sole Source Procurement

Policy last updated: 25 February 2011

Purpose:

To provide criteria and procedures for non-competitive purchasing.

[BSJ-145 Sole Source Procurement](#)

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BSJ-170 Acquiring Rare Books/Goods from Auction Houses

Policy last updated: 12 September 2011

Purpose:

To provide departments with a procedure for acquiring rare books from auction houses (i.e., e-Bay).

[BSJ-170 Acquiring Rare Books/Goods From Auction Houses](#)

BSJ-175 Contract Requirements for Dedicated on-site Service Contractors Performing Services on Campus

Policy last updated: 8 September 2011

Purpose:

To define employment-related minimum standards required of defined service contractors or covered contractors (see definition below) doing business with the University on the University's campuses.

[BSJ-175 Contract Requirements for Dedicated on-site Service Contractors performing services on campus](#)

BSJ-180 Sustainable Procurement

Policy last updated: 31 August 2011

Purpose:

To strive to purchase environmentally and socially responsible materials and products.

[BSJ-180 Sustainable Procurement](#)

BSJ-185 Cell Phone and PDA's

Policy last updated: 3 October 2011

Purpose:

This policy sets forth the circumstances under which the University of Miami ('University') will provide a taxable cell phone allowance or a University-provided Personal Digital Assistant (PDA) to faculty and staff whose duties and responsibilities require them to maintain a cell phone or Personal Digital Assistant (PDA) for business use. The processes described in this document will be the only methods used to provide cell phone or PDA services. Other reimbursement methods are not permitted.

[BSJ-185 Cell Phones and PDA's](#)

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Purchasing Code of Ethics

Purpose:

1. Avoid the intent and appearance of unethical or compromising practice in relationships, actions and communications.
2. Demonstrate loyalty to the employer by diligently following the lawful instructions of the employer, using reasonable care and granted authority.
3. Avoid any personal business or professional activity that would create a conflict between personal interests and the interests of the employer.
4. Avoid soliciting or accepting money, loans, credits or preferential discounts and the acceptance of gifts, entertainment, favors or services from present or potential suppliers that might influence, or appear to influence, supply management decisions.
5. Handle confidential or proprietary information with due care and proper consideration of ethical and legal ramifications and governmental regulations.
6. Promote positive supplier relationships through courtesy and impartiality.
7. Avoid improper reciprocal agreements.
8. Know and follow UM policies and procedures.
9. Encourage support for socially diverse practices.
10. Conduct supply management activities in accordance with UM policies and procedures.
11. Develop and maintain professional competence.
12. Enhance the stature of the purchasing profession.

[Code of Ethics](#)