**Purchasing using a Procurement Card**

**IDENTIFY NEED**

Identify need for a good or service that does not require a Purchase Order and falls within department/NU P-card transaction allowances

Whenever possible, it’s recommended that every effort is made to make purchases through a Preferred Vendor

**FIND SUPPLIER**

Identify potential suppliers

Is there a conflict of interest?

Have someone else make purchasing decision

Select vendor, negotiate best price. Inform vendor of NU tax-exempt status and if necessary, proof of tax-exempt status is available from PRS

**PLACE ORDER**

Person who was issued the P-card places the order, provides credit card information and retains receipt for reconciliation

Maintain monthly transaction log

Vendor is paid

As soon as the transaction appears on the issuing bank’s J.P. Morgan PaymentNet site, change allocation from the cardholder’s default chart string and account to the appropriate chart string and account

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**Applicable Policy/Training Notes**

Be sure to check the Procurement Card website to see if your school or department has additional guidelines. See the “School Specific Materials” section.

- Financial Policies and Procedures
- Purchasing Resource Services

- Conflict of interest policy (research with NIH)
- NU conflict of interest policy
- Guidance for Answering Staff COI Questionnaire
- Tax-Exempt status and resources
- Item R (Tax-Exempt Status) in Purchasing Policy & Procedures
Purchasing using a Procurement Card

**RECEIVE ORDER**

1. Vendor delivers product or provides service
2. Is good/service satisfactory?
   - Contact vendor, Accounting Services or file a dispute online through PaymentNet
3. Verify charges on statement against retained detailed receipt
4. Cardholder signs as proof of verification monthly statement with attached receipts and monthly log, forwards to dept. head
5. Dept. head signs statement as proof of approval
6. NU pays account balances in full each month
7. Charge hits your budget as allocated
8. ASRSP reviews all sponsored account charges; authorized Northwestern offices perform periodic audits of procurement card activity

**CLOSE ORDER, INVENTORY, RECYCLE**

- Process Map created in partnership between HR Learning & Organization Development, Financial Operations and Accounting Services, Purchasing Resource Services, Accounts Payable, and Accounting Services for Research and Sponsored Programs.
- Please share your feedback about this Process Map by completing a brief survey.