Bank of America Visa Purchasing Card Program

Approver/Reviewer Responsibilities

The Small Purchase Charge Card (SPCC) Program is designed to streamline the procurement process for small dollar transactions. This process reduces administrative cost for the University and vendors.

Approver/Reviewers are expected to ensure that cardholders they supervise use the cards properly. Therefore, they are expected to know the general policies and procedures governing the University’s Small Purchase Charge Card Program. Specifically, Approver/Reviewers are expected to:

- Approve the issuance and use of cards for employees under their supervision if the employees are University classified or faculty, and not hourly or employees of the Foundation.
- Determine spending limits for the cardholder based on an actual analysis of the department’s spending activity.
- Ensure proper use of card by reviewing departmental charges for accuracy and appropriateness of purchases.
- Electronically review and approve the cardholder’s transactions in Works using the following documentation for the cardholder: the ODU Reconciliation report, receipts, credit slips, and other needed justifications.
- Ensure any unusual purchases are documented in the file.
- Ensure SWAM procedures were followed for all purchases.
- Ensure funds for returned merchandise is credited back to the SPCC.
- Ensure the cardholder maintains centrally, the monthly reports, corresponding receipts, and other justification documents.
- Perform and submit a written review annually of the cardholder’s limits and spending activity.
- Notify the Program Administrator of a cardholder’s pending department transfer or University separation.
- Ensure cardholder completes a signoff of outstanding charges in Works before leaving the department or University. Additionally, ensure the card is turned into the Program Administrator before the employee leaves.
- Revoke a cardholder’s card for improper use & immediately advise Program Administrator of the action.
- Complete mandatory State training for Approver/Reviewer annually.
- Certify by electronically signoff that the specific goods and services are (i) essential and necessary, (ii) appropriately budgeted for, (iii) have been properly received, (iv) are in compliance with the University’s SWaM Plan, and (v) directly support the mission of the University.

Please indicate your understanding and acceptance of the Approver/Reviewer responsibilities by signing, dating, and returning this document to the Program Administrator.

Cardholder Name: _________________________

_________________________________________
Printed Name of Cardholder’s Approver/Reviewer

_________________________________________     __________________
Signature of Cardholder’s Approver/Reviewer     Date

Revised 1/2016
Accessing the ODU Annual PCard Training in Blackboard

The Commonwealth of Virginia’s PCard Policy and Procedure, CAPP Topic 20355, requires annual training of all Small Purchase Charge Card Cardholders. Agency Program Administrators must certify to the Department of Accounts the completion of cardholder training annually. The training module online in Blackboard, which Cardholders and Approver/Reviewers may enter using a Midas ID & password.

*Our new ODU Annual PCard Training, live as of March 2016, replaces the Annual DOA PCard Training for both Cardholders and Card Approver/Reviewers. The new training incorporates information specific to ODU.*

**STEP 1**

Log in to ODU’s Blackboard with your Midas ID & password.

1. Click on the “My Professional Learning” tab at the top of the page.

**STEP 2**

2. In the “Organization Search” box on the left side, type “odu procurement” and click Go.

**STEP 3**

3. In the Organization ID column, you will see 2016SPR_oduprocurement.
4. Hover your mouse over the Organization ID. When you see an arrow, click it. Then click Enroll.
**STEP 4**

5. Click **Submit** to proceed with enrollment.

![Self Enrollment](image1.png)

6. Click **OK** to continue.

![Self Enrollment](image2.png)

**STEP 5**

7. You will be taken to the Training area. Click on the 2016 Annual PCard Training folder.

![Training](image3.png)
8. In the folder, you will see the training video. Click **Watch Video**.

9. After watching the training, click **Mark Reviewed** to enable the training quiz.

**STEP 6**

10. Click **2016 ODU Annual PCard Training Quiz**.
11. The instructions page will open. Click **Begin** to access the questions.

12. After answering all questions, click **Save and Submit**.

13. A page confirming the test was submitted will appear. To view the results of the quiz, click **OK**.

14. The **Review Test Submission** page shows the results of the test. *(All questions must be answered correctly for the quiz to count. If you need to retake the quiz, click **OK** at the bottom of the page to return to the training module.*)
### Review Test Submission: 2016 ODU Annual PCard Training Quiz

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<tr>
<td>Test</td>
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Results Displayed: All Answers, Correct Answers, Feedback, Incorrectly Answered Questions