

PCard Approver/Reviewer Responsibilities

The Purchasing Card (PCard) Program is designed to streamline the procurement process for small dollar transactions & reduce administrative costs for the University and vendors. Approver/Reviewers are expected to ensure that cardholders they supervise use cards properly. Therefore, they are expected to know the policies and procedures governing the University's PCard Program.

New Approver Steps:

1. Complete [SWaM Training](#) online. (instructions for access below)
2. Complete [Ethics Training](#) online. (instructions for access below)
3. Complete [Annual PCard Training](#) in Canvas. (instructions for access below)
4. Email completed Approver Change Form to the Program Administrators at PCardAdmin@odu.edu.

By signing below, Approver/Reviewers agree to:

- ✓ Approve issuance and use of cards for employees under their supervision if the employees are University classified or faculty (not hourly or employees of the Foundation).
- ✓ Determine spending limits for the cardholder based on an estimate of the department's spending needs.
- ✓ 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 credit for returned merchandise is credited back to the PCard.
- ✓ Ensure the cardholder maintains the monthly reports, corresponding receipts, and other justification documents in a place accessible by approver.
- ✓ Notify the Program Administrator of a cardholder's pending department transfer or University separation.
- ✓ Ensure cardholder signs off on 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 PCard 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.

Date Approver completed [SWaM Training](#) _____

Date Approver completed [Ethics Training](#) _____

Date Approver completed [PCard Training in Canvas](#) _____

Please indicate your understanding and acceptance of these responsibilities by signing, dating, and returning this document to the Program Administrator at PCardAdmin@odu.edu .

Cardholder Name: _____

Printed Name of Cardholder's Approver/Reviewer

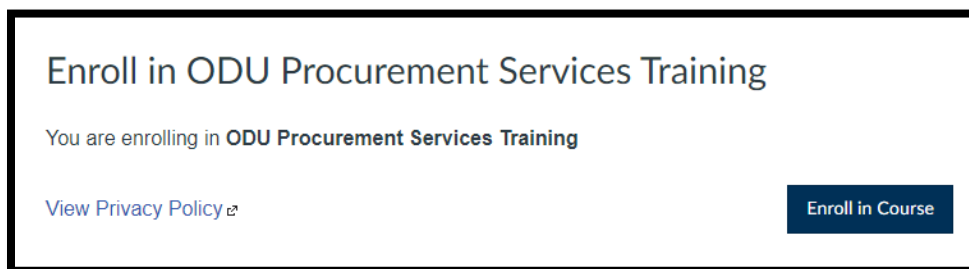
Approver/Reviewer Signature & Date

PA Notes:

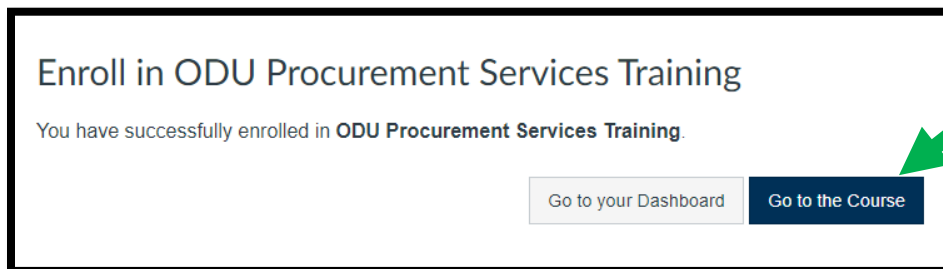
ODU Procurement Trainings are housed in a self-enroll Canvas Course called ODU Procurement Services Training. Campus users may enter this area using their Midas ID & password.

*The training is a module, with the quiz available after you view the training presentation.
Users must get 100% of the answers correct to meet the training requirement.*

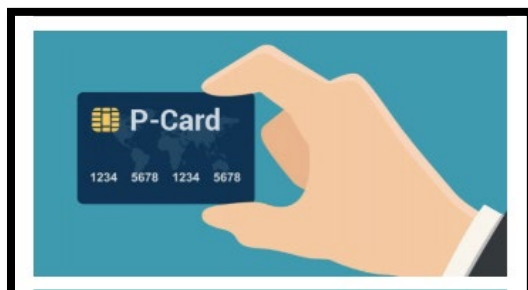
1. Click this [link](#) to self-enroll in ODU Procurement Services Training course. Click button to enroll in course. If there are issues enrolling, please try another browser. If you receive an error message not allowing access to the course, please reach out to ITS for assistance.



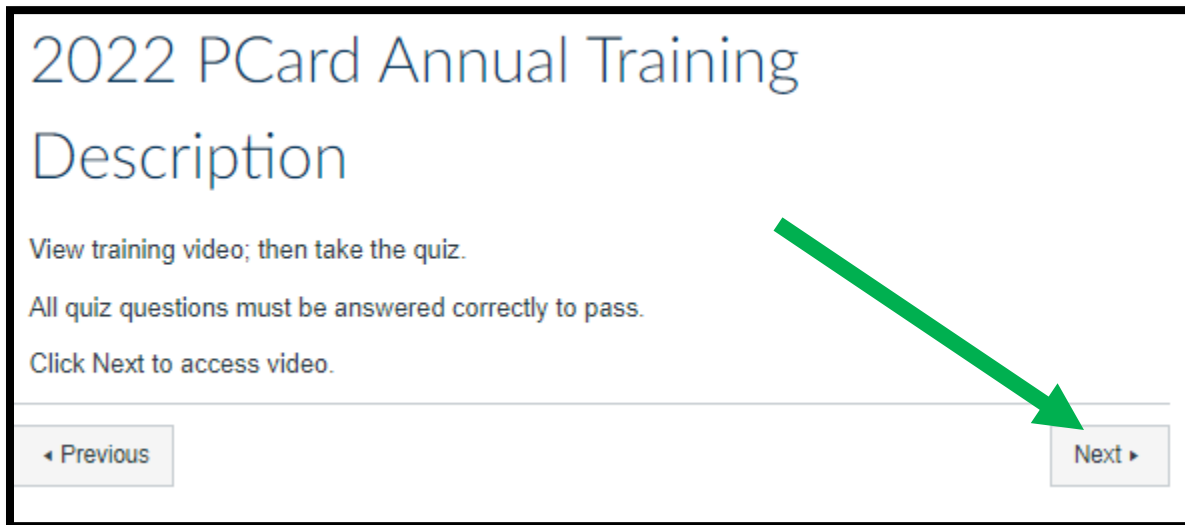
2. On the successful enrollment page that opens, click Go to the Course.



3. Scroll down to find training course desired and click to open. For example, to access PCard Training, scroll down and click the graphic showing PCard. (Other trainings include Contract Administration, Ethics, PCard for Athletics, Selection Advisory Committee, and SWaM.)



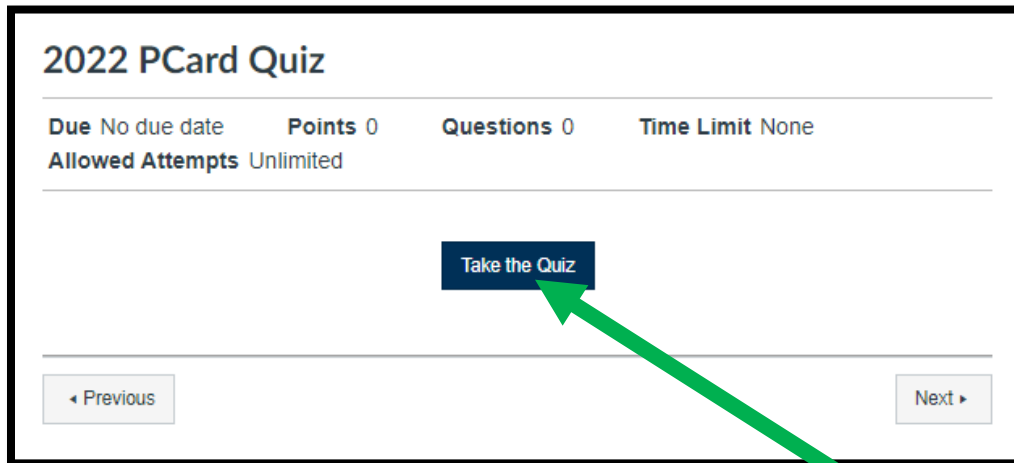
- For each course, there is a description page giving overview. Read overview and click Next to go to training video.



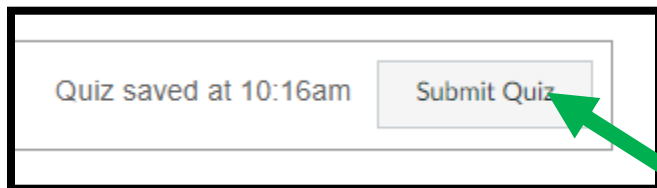
- Click to play video. (Icon with arrows will enlarge video.) After video, click Next to go to quiz/certification page.



- After playing video, click Next to go to quiz/certification page. Click appropriate link to either certify training was completed or to take the quiz.



- After answering all questions, Submit Quiz.



- Quiz results will show at the top and top right. To pass the quiz, all questions must be answered correctly. If all questions are not answered correctly, retake the quiz.

2022 PCard Quiz

Due No due date **Points** 19 **Questions** 19 **Time Limit** None
Allowed Attempts Unlimited

Instructions

All questions must be answered correctly to pass the quiz. If you miss a question, you will want to retake the quiz.

[Take the Quiz Again](#)

Last Attempt Details:

Time: 4 minutes

Current Score: 19 out of 19

Kept Score: 19 out of 19

3 Attempts so far
[View Previous Attempts](#)
Unlimited Attempts

[Take the Quiz Again](#)

(Will keep the latest of all your scores)