



P-Cards, Requisitions & Purchase Orders

Presented by Thom Couto & Krista Scherpf





What is a P-Card?

- A purchasing card for official use only.
- The card should be treated as you would your own credit cards, safely and securely.
- Meant to simplify and speed up small purchases.

The Procurement Webpage – Useful Links

Home > Procurement Services > Frequently Asked Questions

- Procurement Home
- State Contracts
- Links and Forms
- Entering Requisitions
- Vendor Setup
- Purchasing Card Program
- Getting Started
- Guides & Forms
- FAQ
- Solicitations, Awards and Info for Vendors
- Frequently Asked Questions
- Contact Us

Purchasing Card (P-Card) Program

Frequently Asked Questions

- Can it be used for travel?
- What CAN'T it be use for?
- What am I responsible for?
- What are Single Transaction Limits?
- What if I have a problem?

Questions? Email pcard@winthrop.edu and we will happily assist you.

Prohibited Purchases

1. Personal purchases of any kind (Personal purchases are defined as purchases of goods or services intended for non-work-related use or use other than official State business).
2. Cash advances in any form, including use of the card or card number at Automated Teller Machines (ATMs), inside bank branches or at cash advance, quasi-cash and money transfer locations such as Western Union, Telecheck, etc.
3. Gift cards, stored value cards, calling cards, pre-paid cards or similar products.
4. Employee travel expenses, including lodging, transportation (except airline tickets and rental cars), and meals.
 - a. State Institutions of Higher Learning: See Provisos 117.8 and 117.20 of the 2019-2020 Appropriations Act as applicable to Higher Education. This Proviso allows lodging and meals to be paid for athletics and student activities leveraging revenue generated from those activities. See “Student Group Travel by Institutions of Higher Learning” below.
5. Entertainment, including in-room movies.
6. Alcoholic beverages.
7. Tobacco products.
8. Fuel for State-owned vehicles. Many of these purchases may be made with the State Fuel Credit Card, an alternate program.
9. Professional services.
 - a. Exceptions include the payment of student athlete medical invoices required to be paid per NCAA rules.
10. Food for consumption by State employees.
11. Purchases using a P-Card from a vendor with a blocked merchant category code.
12. To make payment on “open” accounts maintained with vendors. The P-Card shall only be used to pay one transaction at a time and cannot be used to pay the accumulated balance of an account.
13. Payment of State and local taxes to the Department of Revenue
14. Purchases made in conjunction with an executed contract or agreement.

J. Order Splitting.

Splitting transactions to avoid the single transaction limit is strictly prohibited and doing so may result in removal of P-Card privileges.



Personal Purchase Affidavit

Steps to take when a personal purchase has been made:

- Contact your supervisor and the p-card administrator.
- Go to the procurement webpage and download the Personal Purchase Affidavit and a Departmental deposit form to bring to Cashiers in Tillman.
- Upload Personal Purchase Affidavit to Works alongside the receipt.



Personal Purchase on P-Card Affidavit

Please complete this form if your University P-Card was used for a personal purchase. Once signed, digitize this form and the departmental deposit and upload it to the receipt field in Bank of America Works.

Merchant: _____

Date: _____ Amount: _____

Please provide a detailed description of items/services purchased and how the purchase on the P-Card occurred:

_____ certify that the expense incurred above was made in error and understand that the University P-Card should not be used for personal purchases. I verify that I have submitted a Departmental Deposit form to the Cashiers Office online and brought the reimbursement to the Cashiers Office to reimburse this accidental expense.

Cardholder Signature/Date: _____

Supervisor Signature/Date: _____



Single Transaction Limits

The single transaction limit is used to control spending, enforce policy compliance, and ensure authorized usage.

Temporary increases can be granted if requested ahead of the purchasing need.

Typical limits are set to \$1,500 or \$2,500, based on overall need. If you are unsure of what your limit is, feel free to email pcard@winthrop.edu

Splitting a transaction into 2 or more smaller transactions to stay under your limit is prohibited!

Procurement Card Limit Increase Request Form

Complete the below fillable form and submit to Procurement Services at purchasing@winthrop.edu along with any applicable documentation. To help with planning, please allow 2-3 business days for processing any submitted change requests.

Information

Cardholder Name: Date of Request:
CWID: Last Four # on Card:
Department: Email:

Monthly TXN Limit

Please select increase type, specific amount, and indicate temporary dates if necessary:

Permanent Increase Above \$5,000:
Temporary Increase Above \$5,000:
Temporary Timing: through

Single TXN Limit

Please select increase type, specific amount, and indicate temporary dates if necessary:

Permanent Increase Up To \$2,500:
Temporary Increase Above \$2,500:
Temporary Timing: through

Justification

Please provide a thorough explanation and justification for the amount and timing requested:

Approvals

Signature of Cardholder: Date:
Signature of Supervisor: Date:
Signature of VP/Dean: Date:
Signature of President or Designee* Date:

* Designee can either be the Vice President of Finance or the Director of Procurement.

Food & Lodging

- Staff cannot partake in food purchased with the p-card
 - Exception: Unless they are in a travel capacity and chaperoning students.
 - Examples would include athletic team travel or from student activities leveraging revenue generated from those activities.
- Any charges found out of compliance must be reimbursed to the college by the cardholder within 10 days of discovery.
- To be authorized for food & lodging purchases, the cardholder must have a signed acknowledgement on file.

VIII. Student Group Travel by Institutions of Higher Learning

For an institution of higher learning, acting under policies approved by its Board of Trustees, use of the P-card may be authorized by Agency P-Card Administrators for meal and lodging purchases incurred for the travel of student groups under the following procedures when expending funds derived wholly from athletic or other student contests, from the activities of student organizations, and from the operations of canteens and bookstores, and from Private Practice or funds other than general funds provided:

1. Only certain designated staff members who chaperone student trips routinely will be authorized to use P-cards for student group travel.
2. As with all other P-cards, each card must be issued in the name of one employee who is authorized to chaperone student trips. Each employee assigned a card has complete responsibility for the use of that card. The card may not be used by anyone else.
3. P-cards may be used by authorized personnel to purchase food/meals, lodging, and airfares for students and chaperones when on student travel status trips. The p-card may not be used to pay meal or lodging expenses for any state employee who chaperones the students except as authorized under the exception for the institutions of higher learning listed above.
4. All P-card expenditures will be reviewed monthly in accordance with agency P-card review and reconciliation procedures.
5. All P-card charges related to travel expenditures for the students' travel should be accounted for as student travel.
6. Charges related to travel expenses for a state employee chaperone should be accounted for as employee travel. An employee chaperone must comply with state travel regulations for employees, including not using the p-card for their portion of meal and lodging expenses when non-exempt funds are used.
7. Any charges to the P-card that are found to be out of compliance with grant, state and/or institutions guidelines will be reimbursed to the college by the card holder within 10 days of the discovery of the excess charges.
8. Failure to repay excess charges will result in the permanent revocation of P-card use by the offender and will result in disciplinary action by the college.
9. Each P-card holder, with a P-card authorized for food/meal and lodging purchases, will sign, receive, and read a copy of this P-card guideline for food/meal and lodging purchases, acknowledging understanding and receipt of the guidelines, his respective institution's Board of Trustees' travel policies, and the terms of use.

I acknowledge that I understand the State's guidelines above, Winthrop University's P-Card and Travel Policy, and the terms of use.

Name

Date



REQUISITIONS & PURCHASE ORDERS

What is a Requisition/Purchase Order?

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WINTHROP UNIVERSITY

Phone: (803) 323-2143
 Fax: (803) 323-2480
 Email: purchasing@winthrop.edu

Requisition Number: R2600140
 Requisition Date: 07/08/2025
 Transaction Date: 07/08/2025

Requestor Name: Morales, Kirsten
 Vendor Id/Name: W80253967
 Pitney Bowes Inc

Phone Number:
 Ship to: Winthrop University
 Central Receiving
 Rock Hill SC 29733
 ATTN: Kirsten Morales

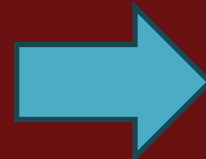
Approvers: Kirsten Morales
 CONT 1 07/08/2025

Account Codes: 111020-6928-71075-600- 23,433.94 Institutional Contracts

Document Text (NO Print):

Line	Description	Quantity	Unit Cost	Total Cost
1	4400030359, Big Machine Rental and Annual Maintenance Rental big machine serial 6011390 Tax: South Carolina Tax Rate Item Subtotal: VENDOR: W80253967 Pitney Bowes Inc	4.00 LOT	241.0800	964.32
2	Annual equipment rental maintenance Annual equipment rental maintenance Tax: South Carolina Tax Rate Item Subtotal: VENDOR: W80253967 Pitney Bowes Inc	1.00 LOT	2,244.9700	2,244.97
Addl Charges:				.00
Total Taxes:				224.65
Total:				3,433.94

By this signature, I deem the price for these products/services fair and reasonable to the best of my knowledge per Higher Education Bill 472 approved August 3, 2011



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WINTHROP UNIVERSITY

(803) 323-2143 Fax: (803) 323-2480
 Email: purchasing@winthrop.edu

PO Number: P2600103
 PO Date: 07/08/25

Vendor:
 Pitney Bowes Inc
 1 Elmcroft Rd
 Stamford CT 06926-0700

Ship to:
 Kirsten Morales
 Winthrop University
 Central Receiving
 349 Columbia Ave
 Rock Hill SC 29733

SEND BILLING INVOICE TO:
 accounts payable@winthrop.edu

ACCOUNT CODES:
 111020-6928-71075-600- \$3,433.94

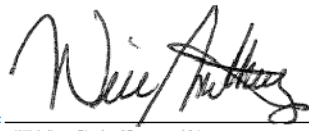
OR
 Winthrop University, Accounts Payable
 125 Tillman Bldg.
 Rock Hill, SC 29733
 (803) 323-2243

Requisition Number: R2600140

Buyer: Will Anthony
 Terms: Net 30 days.

Purchase order number must appear on all packages, correspondence, invoices and shipping notices.

Line	Description	Quantity	Unit Cost	Total Cost
1	4400030359, Big Machine Rental and Annual Maintenance Rental big machine serial 6011390 Tax: South Carolina Tax Rate Item Subtotal:	4.00 LOT	241.0800	964.32
2	Annual equipment rental maintenance Annual equipment rental maintenance Tax: South Carolina Tax Rate Item Subtotal: DISCOUNT: ADDL CHARGES:	1.00 LOT	2,244.9700	2,244.97
TOTAL:				3,433.94

Approved by: 
 Will Anthony, Director of Procurement & Insurance

WINTHROP UNIVERSITY

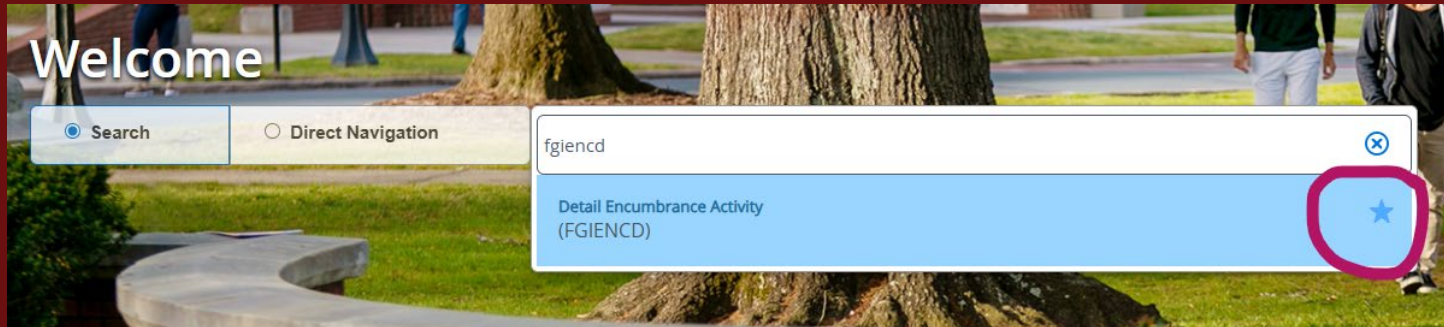


Why They're Important

- Requisitions and Purchase Orders protect YOU, the vendor, and the University
- Every non-P-Card, non-Direct Pay purchase **must start with a requisition – No PO, No Pay**

Requisition Quick Tips

- “Favorite” (hit the star) your most-used forms.



- Copy Requisition

- FGIENCD/Detail Encumbrance Activity

✕ **Ellucian** Detail Encumbrance Activity FGIENCD 9.3.21 (PROD)

 ADD RETRIEVE RELATED TOOLS

Encumbrance: Encumbrance: **All** Go
 Period:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

✕ **Ellucian** Detail Encumbrance Activity FGIENCD 9.3.21 (PROD)

Encumbrance: P25 Encumbrance Period: All

▼ ENCUMBRANCE INFORMATION

Description	<input type="text" value=""/>	Date Established	09/18/2024
Status	C	Balance	0.00
Type	P	Vendor	<input type="text" value=""/>

▼ ENCUMBRANCE DETAIL

Item	0 Document Accounting Dist	Orgn	<input type="text" value=""/>
Sequence	1	Acct	<input type="text" value=""/>
Fiscal Year	25	Prog	<input type="text" value=""/>
Status	C	Actv	
Commit Indicator	U	Locn	
COA	W	Proj	
Index		Encumbrance	1,174.11
Fund	<input type="text" value=""/>	Liquidation	-1,174.11
		Balance	0.00

1 of 1 | 1 Per Page

▼ TRANSACTION ACTIVITY

Hidden Superpower: Blanket Requisitions/POs

Requisition: R2500354

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition	R2500354	Comments		<input type="checkbox"/> In Suspense
Order Date	08/09/2024	Commodity Total	0.00	<input type="checkbox"/> Document Text
Transaction Date	08/09/2024	Accounting Total	0.00	
Delivery Date	08/09/2024			<input checked="" type="checkbox"/> Document Level Accounting

Requestor/Delivery Information Vendor Information **Commodity/Accounting** Balancing/Completion

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
		***		SCG			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount Tax Distribute

Discount Commodity Total

Additional Document Total

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
	W										<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount % USD

Extended Amount	<input type="checkbox"/>	
Discount	<input type="checkbox"/>	
Additional	<input type="checkbox"/>	
Tax	<input type="checkbox"/>	
FOAPAL Total		
Document Total		
Remaining Commodity Amount		

Common Pitfalls

Which of the following concerns can present the most issues when it comes to Requisitions and Purchase Orders?

- A) Buy first, requisition later
- B) Missing documents
- C) Wrong vendor

Answer: All of the above.

Buying something before creating a requisition for it requires an **Unauthorized Purchase Form.**

Questions?





JEOPARDY!

CARDINAL RULES

**IN POWER
TRUST**

**QUOTE ME
ON THAT**

**THE WAY WE
WERE**

**WHO YOU
GONNA
CALL?**

CARDINAL
RULES

IN POWER
TRUST

QUOTE ME ON
THAT

THE WAY WE
WERE

WHO YOU
GONNA CALL?!

\$100

\$100

\$100

\$100

\$100

\$200

\$200

\$200

\$200

\$200

\$300

\$300

\$300

\$300

\$300

\$400

\$400

\$400

\$400

\$400

\$500

\$500

\$500

\$500

\$500



**ON THE P -CARD, WHAT
IS NEEDED TO PROVE
WHAT WAS PURCHASED
AND THE AMOUNT
PAID?**

AN ITEMIZED RECEIPT

**A FACULTY MEMBER IS
HAVING A BABY. YOUR DEPT
WANTS TO SEND THEM A
GIFT BASKET. IS THIS
PERMITTED ON THE P-
CARD?**

**NO, GIFTS ARE
PROHIBITED
PURCHASES.**

**YOU ARE A LIAISON FOR A P A P-CARD
AND THE CARDHOLDER HAS
INAPPROPRIATELY USED THEIRS,
BUT SIGNS OFF ANYWAY. THE
SUPERVISOR ALSO SIGNS OFF.
WHAT SHOULD YOU DO?**

**CALL PROCUREMENT
SERVICES/
PURCHASING**

**A CAMPUS EVENT WILL
PROVIDE PIZZA TO ALL
ATTENDEES, INCLUDING
STUDENTS, ALUMNI, FACULTY, &
STAFF.**

**CAN THE PURCHASE BE MADE
WITH THE P-CARD?**

**NO, FOOD CANNOT BE
PURCHASED FOR STATE
EMPLOYEES WITH THE P-
CARD, UNLESS THEY ARE IN
A TRAVEL CHAPERONE
CAPACITY.**

**YOUR DEPT NEEDS TO
PURCHASE SOMETHING
THAT EXCEEDS YOUR
STL. WHAT SHOULD
YOU DO?**

**SUBMIT A PROCUREMENT
LIMIT INCREASE
REQUEST FORM AHEAD
OF YOUR PURCHASING
NEED.**

**YOU'VE CREATED A
REQUISITION BUT
REALIZED YOU USED THE
WRONG VENDOR. WHAT
SHOULD YOU DO?**

**CANCEL YOUR REQUISITION
(OR ASK PURCHASING IF IT'S
GONE THROUGH APPROVALS)
AND REMAKE THE
REQUISITION WITH THE
CORRECT VENDOR.**

**YOU NEED TO RECREATE THE
SAME REQUISITION AS ONE
YOU MADE A FEW MONTHS
AGO. HOW CAN YOU QUICKLY &
EASILY DO SO, WITHOUT
REINVENTING THE WHEEL?**

**GO INTO MY REQUISITIONS
TO FIND IT, CLICK ON IT,
AND CLICK “COPY
REQUISITION” IN THE TOP
RIGHT CORNER.**

**YOU NEED TO GET
ACCESS TO A FUND
CODE IN BANNER FOR
A REQUISITION. WHAT
SHOULD YOU DO?**

**CONTACT THE BUDGET
OFFICE /
CHARLENE BOGGS.**

**THIS FORM IN BANNER
PRODUCTION CAN BE USED
TO SEE IF A PURCHASE
ORDER IS OPEN OR WHAT
THE BALANCE OF IT IS.**

**FGIENCD/DETAIL
ENCUMBRANCE
ACTIVITY**

**YOU NEED TO ADD
MONEY TO AN
EXISTING PO. HOW DO
YOU DO A CHANGE
ORDER?**

**SUBMIT A NEW REQUISITION
REFERENCING THE ORIGINAL
PO NUMBER SAYING IT'S A C/O,
AND IN THE AMOUNT, ENTER
THE TOTAL AMOUNT TO ADD TO
THE EXISTING PO.**

**TRUE OR FALSE:
A SPECIFIC BRAND OF AN
ITEM CAN BE REQUIRED
IN A SOLICITATION (NOT
INCLUDING GRANTS).**

FALSE

**YOU WANT TO BUY
SOMETHING OVER
\$10,000 BUT UNDER
\$25,000.**

HOW DO YOU PROCEED?

**GET 3 QUOTES OR ASK
PROCUREMENT TO
POSITION
SCBO/REACH OUT TO
PURCHASING.**

TRUE OR FALSE:

YOU'VE PUT OUT A SOLICITATION FOR SCIENTIFIC EQUIPMENT, AND YOU NEED IT TO BE DELIVERED BY THE BEGINNING OF THE ACADEMIC YEAR. THIS SHOULD NOT BE INCLUDED IN THE ORIGINAL SOLICITATION.

**FALSE -- EVERYTHING
YOU NEED MUST BE
INCLUDED IN THE
ORIGINAL
SOLICITATION.**

**YOUR DEPT WANTS TO ENTER
INTO A 3-YEAR AGREEMENT
WITH A COMPANY, WHERE THE
COST PER YEAR IS UNDER
\$10K, BUT THE TOTAL IS OVER.
HOW DO YOU PROCEED?**

**YOU GET 3 QUOTES OR
ASK PURCHASING TO
POST ON SCBO.**

**TRUE OR FALSE:
IF A SOLICITATION SAYS
THE VENDOR “SHOULD” DO
SOMETHING, IT MEANS
THAT THEY ARE REQUIRED
TO DO IT.**

**FALSE. SHOULD IS NOT
THE SAME AS “MUST.”
WORDS ARE
IMPORTANT!! 😊**

**FOR THE FIRST COUPLE OF
DECADES OF WINTHROP
BEING OPEN, THIS
INDIVIDUAL OVERSAW ALL
PROCUREMENT FUNCTIONS
FOR THE INSTITUTION.**

THE PRESIDENT

AROUND 1919, A “LAZY
HORSE” (VERBATIM) WAS
REPLACED WITH THE
PURCHASE OF THIS PIECE
OF AGRICULTURAL
EQUIPMENT.

A TRACTOR

**CAPITAL PROJECTS: IN
1898, IT WAS
ESTIMATED THAT A
DORMITORY WOULD
COST THIS MUCH TO
BUILD.**

\$15,000

**IN THE EARLY 1900S,
THIS CLASSIC
POSITION SERVED THE
FUNCTION OF
ACCOUNTS PAYABLE.**

THE BOOKKEEPER

**IN THE MID TO LATE 2010s,
WINTHROP UNIVERSITY
LOST THIS FOR ONE YEAR,
DUE TO SOLE SOURCE
PROCUREMENTS THAT
WERE NOT SOLE SOURCES.**

**ALL PURCHASING
POWER/BUYING
AUTHORITY.**

**WHEN BANNER IS NOT
WORKING**

IT/THE HELP DESK

**WHEN THERE HAS
BEEN FRAUD ON YOUR
P-CARD, OR YOUR
CARD HAS BEEN
STOLEN**

**PURCHASING AND BOA
WORKS. (BOA WORKS
ALONE WORKS, BUT
YOU MUST *ALWAYS*
CALL BOA)**

**YOUR TRAVEL
REIMBURSEMENT HAS
NOT YET PROCESSED.
WHO SHOULD YOU
CONTACT?**

ACCOUNTS PAYABLE

**YOU NEED TO CREATE
A JOURNAL ENTRY.
WHICH OFFICE CAN
HELP IN CREATING
ONE?**

THE CONTROLLER'S OFFICE

**YOU RECEIVE A
CONTRACT TO SIGN.
WHO DO YOU SEND IT
TO?**

PURCHASING/

CONTRACTS

EMAIL/LEGAL

EMAIL/KEVIN BUTLER

Thanks for playing!

