



April 5, 2011

Division of Purchases
Information Circular Number 11-02

SUBJECT: Policy for Use of Agency P-Card Employee ID in SMART

I. GENERAL INFORMATION

SMART requires that each Procurement Card (P-Card) be assigned to an individual Employee ID (EMPLID) under the Cardholder Profile. The State has previously allowed for Cardless Travel accounts and Vehicle cards be assigned to a non-person, i.e. the vehicle card has the vehicle tag number imprinted on the card. By allowing such assignment, the agency was able to allow more than one person to use the card, yet still have one individual responsible for all charges.

At SMART go-live, each P-card was required to be assigned to one EMPLID. As employees have changed positions or left employment, transactions have become more difficult to reconcile and problems were discovered when moving a P-card from one Cardholder Profile to another Cardholder Profile.

To address this situation, each agency will be allowed to have a new 'non-person' EMPLID ("Agency P-Card EMPLID") to be used EXCLUSIVELY for assignment of Cardless Travel accounts and Vehicle P-card accounts. This will allow for these P-card accounts to remain with the "Agency P-Card EMPLID" regardless of employment changes.

II. ALLOWED USE

Upon request from the Agency P-Card Coordinator, one "Agency P-Card EMPLID" will be established, using the format of XXX00PCARD, where XXX is the agency number. The "Agency P-Card EMPLID" will reside in the SMART system only; it will not be contained in SHARP. The "Agency P-Card EMPLID" shall not be used in any fashion except to assign Cardless Travel accounts and Vehicle P-card accounts. All other P-Card accounts must be assigned to a specific individual under their EMPLID.

An agency may choose to NOT use the "Agency P-Card EMPLID" and leave the cards assigned to an individual. If so and if that individual leaves the agency employment, then any Cardless Travel accounts or Vehicle P-card accounts assigned to that individual **MUST** be cancelled with UMB and a new card issued for their successor. The original card number shall not be deleted from the original Cardholder Profile.

III. PROCEDURE

Agencies utilizing the "Agency P-Card EMPLID" must follow the procedure below:

- a. Request Department of Administration to have the "Agency P-Card EMPLID" established.
- b. Identify all affected Cardless Travel accounts and/or Vehicle accounts that should be placed under the "Agency P-Card EMPLID".
- c. Contact UMB and request that NEW accounts be established for these P-Cards. DO NOT delete the current account from the Cardholder Profile in SMART, as once this occurs the P-card transactions previously uploaded become "orphaned" in SMART, meaning they are no longer associated with a Cardholder Profile.
- d. Once the new P-Cards are established, enter the cards under the XXX00PCARD Cardholder Profile.
- e. Assign the applicable proxies and chartfields for each account.
- f. Notify any applicable vendors, such as Enterprise, Hertz or Short's Travel, of the account number change.
- g. Request UMB to cancel the previous assigned accounts.
- h. In SMART, change the expiration date on the cancelled account to reflect the cancelled date.

IV. RESTRICTIONS

The "Agency P-Card EMPLID" will be created by the Department of Administration. While an agency user may have the ability in SMART to edit information related to this EMPLID, agency users are prohibited from making any changes except through the Cardholder Profile. Any changes to the "Agency P-Card EMPLID", except through the Cardholder Profile, will be monitored by the Division of Purchases on a regular basis.