



Mandatory Purchase Card (P-Card) Training for Cardholders

March 15, 2012



Consideration of ACES and Section 508



Topics

- Cardholder
- Approving Official
- Resources and Handouts
- Backup Material for details on
 - IT, EIT, and Imbedded IT
 - Consideration of ACES
 - Section 508



Cardholder: Identify IT and EIT

- Properly identify information technology (IT) and electronic and information technology (EIT)
- If you are an order taker, ensure that the individual with the requirement identifies to you IT and EIT



Cardholder: Consideration of ODIN

- Use KDP-KSC-P-1838 to consider ACES
- If not purchasing from ACES
 - Note ACES due diligence statement (Note 5)
- Document ACES due diligence statement
 - Order Log Comments [Bankcard]
 - Header [IT PR]
- If you are an order taker, ensure that the individual with the requirement provides to you
 - ACES due diligence statement
 - Price data comparisons if ACES due diligence statement is “ACES: Purchase of IT item from other sources is in the best interest of the government.”



Cardholder: Section 508

- Perform market research
- Determine compliance
- Document EIT and compliance
 - Order Log radio buttons [Bankcard]
 - NF 1707 [IT PR]
- Document market research
 - Order Log Comments [Bankcard], or
 - Cardholder files [Bankcard, IT PR]
- If you are an order taker, ensure that the individual with the requirement provides to you
 - EIT determination and Section 508 compliance determination
 - Market research records



Approving Official

- Check for the proper identification of IT and EIT
- Check consideration of ACES
 - Order Log Comments [Bankcard]
 - Header [IT PR]



Approving Official

- Check EIT determination and Section 508 compliance determination
 - Order Log radio buttons [Bankcard]
 - NF 1707 [IT PR]
- Check Section 508 market research documentation
 - Order Log Comments [Bankcard], or
 - Cardholder files [Bankcard, IT PR]



Resources and Handouts

- Consideration of ACES
 - KDP-KSC-P-1838 Consideration of ACES as the Source of Information Technology
- Section 508
 - <http://section508.nasa.gov/>
 - SATERN: PROC-001-05 NASA Purchase Card Program [Training]
 - ACES Catalog [Market Research]
 - Sample Section 508 Market Research Procedure
 - NF 1707 Certification and Special Approvals for Purchase Requisitions



Property Tagging

Muzette Fiander
Logistics & Services Branch (TA)
Supply & Equipment Management Officer
(SEMO)



P-Card Training

- **Controlled equipment is defined as all equipment with an acquisition cost of \$5,000 or more with an estimated service life of 2 yrs. or longer and/or will not be consumed or expended in an experiment. It also includes selected items of equipment with an acquisition cost less than \$5,000 and identified as “sensitive” by the Center or NASA Headquarters.**
- **Sensitive items of equipment are defined as equipment which is considered to be highly pilferable or desirable for personal use, e.g. computer equipment, cameras, TVs and refrigerators. These items are controlled at \$500 and above.**
 - **Exception: Weapons, (all types) and hazardous devices, regardless of value are “*sensitive*.”**
 - Other items that have a high loss rate as reflected by a Center’s reports of survey or at the discretion of the Supply & Equipment Management Officer (SEMO) may be declared/identified as “*sensitive*.”
 - A complete list of the “*sensitive items*” can be found in the procedures for cardholders.



P-Card Training

- **All equipment ordered on a credit card that meets the criteria for controlled property MUST go through Central Receiving, for tagging. The ship to address is:**
 - **NASA Transportation Officer**
 - **Bldg. M6-744**
 - **ATTN: Property Management**
 - **Kennedy Space Center, FL 32899**
- **If equipment is going to be picked up by the cardholder/requester, they must contact ISC Receiving (7-4137) to ensure the item gets tagged and is accounted for. ISC will provide instructions on where to take the equipment for tagging purposes and will notify the cardholder/requester when it is ready for pick-up. There will, however, be exceptions for emergencies. In cases where the equipment is large and delivered directly to the worksite, the tagging will be done in the field (operational area). For tagging in the field, contact ISC Property Administration (7-4137) and advise them that an item has been delivered that requires tagging. (It would be even more efficient if the coordination is accomplished prior to delivery.)**



P-Card Training

- **The Property Office is currently conducting an internal audit on all P-card purchases over \$500 that were made during this past year. A random sampling of purchases were selected and cardholders have been notified. The auditor will determine if the item met the tagging criteria and if so, was it tagged. They will also be verifying that the item was in fact received by the requesting activity. Discrepancies will be referred to the Procurement Office for further follow-up.**
- **Thereafter, audits of P-card purchases will be conducted on a quarterly basis as coordinated between Property (TA-A5A) and Procurement (OP-OS).**



MISUSE OF THE GOVERNMENT PURCHASE CARD

**KSC OFFICE OF THE CHIEF COUNSEL
MARCH 13, 2012**



BACKGROUND

- Purchase Cards have streamlined the acquisition process, but many non-procurement personnel are unaware of the restrictions on card use and consequences for not properly spending Government funds.
- This briefing will cover statutes, regulations and penalties involved when using the Purchase Card for non-authorized and/or personal use.



Rules on Misuse of a Government Purchase Card

- Federal laws and regulations place restrictions on the actions of Government personnel.
- Intentional use of the Purchase Card for non-approved purchases may be considered an attempt to commit fraud against the United States Government and may subject cardholders to criminal penalties ranging from fines to imprisonment.
 - 18 U.S.C. §1001
 - Whoever, in any matter within the jurisdiction of the executive, legislative, or judicial branch of the Government of the United States, knowingly and willfully--
 - (1) falsifies, conceals, or covers up by any trick, scheme, or device a material fact;
 - (2) makes any materially false, fictitious, or fraudulent statement or representation; or
 - (3) makes or uses any false writing or document knowing the same to contain any materially false, fictitious, or fraudulent statement or entry;shall be fined or imprisoned not more than 5 years.



Rules on Misuse of a Government Purchase Card

- Use of the Purchase Card for personal benefit may constitute theft which will also subject the cardholder to criminal fines and imprisonment.
 - 18 U.S.C. 641
 - Whoever embezzles, steals, purloins, or knowingly converts to his use or the use of another, or without authority, sells, conveys or disposes of any record, voucher, money, or thing of value of the United States or of any department or agency thereof, or any property made or being made under contract for the United States or any department or agency thereof; or
 - Whoever receives, conceals, or retains the same with intent to convert it to his use or gain, knowing it to have been embezzled, stolen, purloined or converted--

Shall be fined or imprisoned

- Over \$1,000 – Up to 10 years;
- Under \$1,000 - Up to 1 year



Rules on Misuse of a Government Purchase Card

- Further, as a Federal employee, you are subject to the Standards of Ethical Conduct for Employees of the Executive Branch. These Standards are incorporated into the Code of Federal Regulations at 5 C.F.R. 2635, Subpart G.
- The Standard of Conduct on Misuse of Position prohibits you from using your position for private gain.
- This Standard also makes it your duty to protect and conserve Government property and not to use it or to allow its use for other than authorized purposes.
- Violation of the Standards of Conduct subjects you to disciplinary action ranging from a Letter of Reprimand to Termination.
- Cardholders may be held personally liable to the Government for the amount of any non-Government transaction.



EXAMPLES OF MISUSE

- Young man who charged his honeymoon
- Young man who charged his new sports car
- Soldier who spent \$3,100 on six visits to Hooters and Bottoms Up
- Employee's wife who spent \$13,000 on a shopping spree in Puerto Rico
- Employee's wife who used the card for internet gambling
- Bureau director who accessed ATM for gambling money in Atlantic City
- DoE employee who purchased pornographic services off the internet

- A military official used the Government Purchase Card to purchase sunglasses for the parachute team, when that particular item is prohibited by regulation to be worn during the training. The official received counseling and Purchase Card training.



EXAMPLES OF MISUSE AND PENALTIES

- A 30-day suspension is an adequate punishment for a government worker who accidentally charged \$226.12 on his purchase card, according to the Merit Systems Protection Board (MSPB).
 - A 17-year Veterans Affairs Department employee admitted that he used his government Citibank card to buy tires for his car, but claimed he mistakenly pulled the wrong card from his wallet. He realized he had used the government card a month later when he received the bill, which Quarters, a supervisor, paid with his own money.
 - Despite the fact that he paid the government back for his "honest mistake," the board ruled that "misuse of a government Charge Card is a serious offense," and the 30-day suspension was reasonable.



EXAMPLES OF MISUSE AND PENALTIES

- An E-1 abused his Government Purchase Card by charging several personal travel items, including: a sightseeing tour in Greece; green fees; show tickets at the Excalibur Hotel and an unauthorized rental vehicle in Las Vegas, NV,; and an aerial sightseeing tour of lighthouses in Bangor, Maine. He was found guilty of card misuse and confined for six months and had to forfeit items purchased.
- Management Assistant for the Veterans Administration purchased television sets and other personal items with her government credit card. She received 5 years of probation and was ordered to pay \$170,000 in restitution to the VA.



EXAMPLES OF MISUSE AND PENALTIES

- Army OIG Management Support Assistant who purchased audio and video equipment worth \$61,365. He altered documents to hide the nature of his purchases. He received four months imprisonment followed by four months of home confinement and had to repay the \$61,365.
- A Lieutenant received a letter of reprimand when he was convicted of dereliction of duty for negligently failing to ensure purchases made by a subordinate were authorized. Over a 1-year period, the subordinate made over \$100,000 in unauthorized purchases, including tires, stereos, and sporting goods.
 - The subordinate received a \$25,000 fine and approx. 36 months confinement.



EXAMPLES OF MISUSE AND PENALTIES

- A retiring military officer directed purchase of \$2,500 worth of coins personalized with his name. He included one of the coins in each of his Christmas cards. His Commander reported it when he received his card with an enclosed coin. The officer was flagged and retirement processing stopped until he wrote a check to the Government in the amount of the coins purchased. He was then allowed to retire and take his coins with him.



CONTACT INFORMATION

KSC Office of Chief Counsel

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Inappropriate Purchases

Susan Kroskey, Deputy CFO for Finance



Inappropriate Purchases

- **Key Concept – If you can't buy it on a Purchase Request (PR) you can't buy it with a bankcard**
- **Contact the Bankcard Coordinator if you have any doubts about whether you can purchase a particular item**
- **Common categories of inappropriate purchases**
 - **Clothing**
 - **Food and Refreshments**
 - **Gifts**



Clothing

- **GAO – “Every employee of the Government is required to present himself for duty properly attired according to the requirements of his position.”**
- **Cannot use appropriated funds to purchase hats, shirts, pants, coats, gloves, shoes, raincoats, umbrellas, or other wearing apparel.**
- **Exception: Safety apparel, such as safety shoes and hard hats for people working in hazardous areas, can be purchased with appropriated funds.**



Food and Refreshments

- **General rule: Cannot use appropriated funds to pay for food and refreshments.**
- **Exceptions to the general rule:**
 - **Awards Ceremony (when recipients are publicly recognized and the authorized agency official has determined that food advances the recognition of the recipients)**
 - **Cultural Awareness Ceremony (food part of a formal program intended to advance EEO objectives and the food consists of samples only)**
 - **Some Training Classes (very limited)**
 - **Some Formal Conferences (very limited)**



Gifts

- **Gifts to Government employees are almost always an improper use of appropriated funds.**
 - Gifts include items such as greeting cards, Thanksgiving turkeys, candy, key chains, cups, caps, buttons, jewelry, pens, and gift certificates.
- **Promotional items reasonably provided in accordance with the Space Act to disseminate information about NASA activities and results thereof are not prohibited gifts.**
 - NASA has historically considered items such as mission stickers, photographs, pins, and patches to be reasonable methods to disseminate information to employees and customers.



Ms. Janet Petro
Deputy Director



Mr. Kelvin Manning
Associate Director for Business Operations



OLG Audit Findings

Brandi Roberts (OP-OS)
Bankcard Coordinator



Office of Inspector General Prior Audit Findings

▪ Findings of Importance

- Approving Officials not reviewing and scrutinizing cardholder transactions prior to approval in P-Card system; essentially a “rubber stamp” approval
- Delinquent Cardholder reconciliations/Approving Official Approvals
- Center Agency Program Coordinator (CAPC) (OP-OS formerly OP-AM) forced to perform reconciliations and approvals for Cardholders and AOs
- Cardholders not keeping receipts
- Special Approvals for prohibited and restricted items not being obtained and/or not properly documented in the P-Card system (i.e. **Comments** field)



Office of Inspector General Prior Audit Findings

■ **Concerns:**

- No existing process for tracking Cardholder and AO transfers between organizations and branches
- Ensuring supervisory relationship between AO's and Cardholders
- AO's not performing regular audits of Cardholder's P-Card transactions/receipts
- Supervisory pressure on Cardholders to use P-Card for the purchase of prohibited and restricted items
- Alternates not being delegated by Cardholders and AO's
- Fragmentation (split purchases) – To circumvent the authorized single purchase/transaction limit of \$3,000



Office of Inspector General Current Audit Findings

▪ Findings of Importance

- NASA should reduce the number of purchase cards
- NASA should improve documentation and approval trail



Office of Inspector General Current Audit Findings

- **Concerns:**
 - Transaction records do not identify the requestor
 - Insufficient audit trail regarding approvals
 - Missing documentation, specifically invoices



Review of P-Card Policies & Procedures/ Responsibilities

**Brandi Roberts
Bankcard Coordinator**



P-Card System

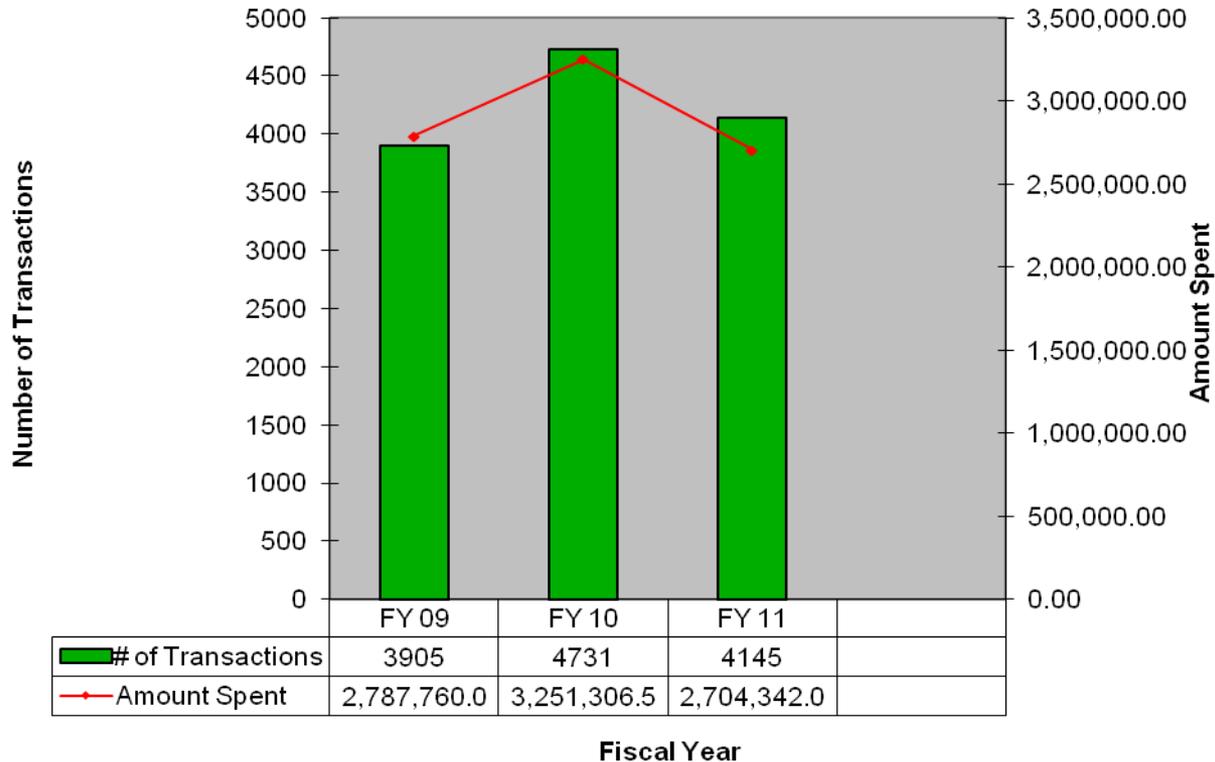
P-Card Solution provides end-to-end electronic bankcard process (from order log creation through payment and archiving of purchases)

- Web-based
- P-Card order log commits funding in SAP
- Electronic reconciliation with Bank Statement
- Cardholder and Approving Official reporting capabilities





Level of P-Card Activity (KSC)



There are currently 101 Cardholders and 91 Approving Officials
9 Cardholders are Procurement and 92 are Technical



Conditions for Use

■ The Cardholder:

- Must cite the correct fiscal year appropriations (See your Resource Analyst)
- Cannot exceed the micro-purchase threshold limit of \$3,000
- Cannot exceed your monthly limit (typically \$10,000) within a given billing cycle (A billing cycle begins on the 16th of each month and ends on the 15th)
- Cannot split purchases (fragment) to circumvent the authorized single purchase limit



Conditions for Use (Cont.)

- **The Cardholder must:**
 - Rotate purchases among commercial vendors to maintain competition
 - Utilize Mandatory Sources
 - Ensure price is fair and reasonable
 - Commit funding prior to purchase by creating an order log in P-Card System
 - Enter shipping costs on a separate line item, can be an estimate
 - Obtain Organizational Approvals as required
 - Obtain Special Approvals as required



Cardholder Responsibilities

- **Cardholder must maintain a file for the following P-Card records:**
 1. Delegation of Procurement Authority Memorandum
 2. Copy of Purchase Card training record
 3. Copies of purchase records, i.e. electronic record of purchase (order log), copies of sales receipts or any other documentation of the purchase
 4. Copy of Order Log and monthly reconciled transactions (electronic or hard copy)
 5. Copy of dispute form (if applicable)

- Items 3, 4, & 5 above shall be kept for the previous 3 fiscal years. All records shall be turned over to Approving Official upon bankcard termination.



Cardholder Responsibilities

- Maintain control and custody of the P-Card
- Purchase only authorized items. Obtain pre-approval when in doubt. Refer to Unauthorized Purchase List @ the Bankcard Homepage often.
- Verify funds availability by creating an Order Log in P-Card prior to placing an order
- Comply with requirements of FAR and NASA FAR Supplement Parts 8 and 13 regarding mandatory sources of supply
- Include shipping as separate line item citing Cat. Code 99 (Ignore the pre-set blank for shipping on the Order Log)
- Hit “**DONE**” when all transactions are reconciled. Print the audit report at end of the reconciliation process and keep with your records (*Signature not required*).



Cardholder Responsibilities

- Inform vendor that purchase is tax exempt
- Try to resolve discrepancies with vendors first
- Monitor any disputed payment until dispute is resolved
- Report any suspected fraudulent charges that appear on your bank statement to J.P. Morgan Chase and to the Bankcard Coordinator
- Ensure delivery and acceptance of purchase
- If sensitive equipment is received, ensure all required tagging is completed in a timely manner
- Review and complete reconciliation of your transactions in P-Card System by established deadline
- Notify approving official after completing reconciliation



Cardholder Responsibilities

- When transferring, retiring, or resigning, Cardholder must:
 1. Transferring - Notify the Bankcard Coordinator
 2. Departing the Center - Hand-carry bankcard to Bankcard Coordinator
- If bankcard is lost or stolen, Cardholder must:
 - Report to J.P. Morgan Chase immediately
 - Domestic - 1-888-297-0781
 - Outside US - 1-847-488-4441 (collect)
 - Notify Bankcard Coordinator and Approving Official
 - Not responsible for charges once reported
 - New purchase card will issued within 10 business days



Cardholder Responsibilities

- Pursuant to FAR Part 8, the following sources must be used in the descending order of priority:
 - Agencies inventories
 - Federal Prison Industries - <http://www.unicor.gov>
 - Committee for Purchase From People Who Are Blind or Severely Disabled - <http://www.abilityone.com/>
 - GSA (GSA Advantage^{*}) - <http://www.gsaadvantage.gov>
 - Mandatory Federal Supply Schedules
 - Optional Use Federal Supply Schedules
 - Commercial sources

- * GSA Advantage is a quick way to access Federal Prisons, Blind, and other severely disabled; and GSA and Federal Supply Schedules



Approving Official Responsibilities

- Approves only permanent civil servants as candidates for Purchase Cards
- Sets up Alternate AO in P-Card System in case of absence (must have Training/ID/Password)
- Reviews and approves monthly reconciled transactions in a timely manner (if the BC is forced to approve to meet Center deadlines, the validity of that cardholder's purchases will reside with the designated AO)
- Ensures purchases are authorized and are for Government use only
- Responds to a yearly call to review spending limits of their cardholders
- Ensures cardholders' reconciled transactions have supporting documentation and are complete, accurate and reflect only authorized government purchases
- Ensures that Cardholders report any suspected fraudulent charges that appear on their bank statement to the JPMC and the BC



Prohibited Items

- **Definition:** Personal convenience items, not necessary for mission performance
- **Examples:** Ash trays, bottled water, buttons, coffee makers, coffee supplies, decorative items, facial tissue, first aid kits, greeting cards, hats, individual membership fees, jewelry, key chains, luggage, pens/pads with logos, microwave ovens, photographs, plants, refrigerators, retirement or other gifts, t-shirts, sandwich bags, Christmas trees, ornaments, candy etc.
- **Requirement:** Must be purchased using employee's personal funds



Prohibited Items – Additional Examples

- Cash Advances
- Products and services provided for by an existing KSC contract (i.e Office supplies, telephones, ACES)
- Gifts (See [PIC 10-14](#))
- Construction (except for authorized cardholders)
- Food, drinks, meals or refreshments (See [PIC 10-14](#))
- Gasoline or oil for vehicles
- Janitorial, yard and maintenance services
- Lease and/or rental of land or buildings
- Lodging, hotels, motels, or other types of overnight accommodations
- Personal clothing or footwear (See [PIC 10-14](#))
- Printing or copying services (statutory) - NPG 1490.5A
- Purchases directly from individuals
- Telephones/Teleconference Systems
- Travel or travel-related expenses (airline, bus, boat or train tickets)

SEE PURCHASE CARD HOMEPAGE FOR COMPLETE LIST



Restricted Items

- **Definition:** Items that require special approval prior to purchasing

- **Examples:**
 - Televisions, DVD Players, Recorders
 - Radios, receivers, and transceivers
 - Refrigerators, Microwaves, Coffee Makers
 - Furniture, Ergonomic Chairs
 - Telecommunications/Fax Machines
 - Training

- **Requirement:** Obtain special approvals and document such approvals in the “comments” field of Order Log

SEE PURCHASE CARD HOMEPAGE FOR COMPLETE LIST & PROCESS



Reminders

- Refer to On-Line Help: The KSC Bankcard Home Page
<http://procurement.ksc.nasa.gov/bcard.htm>
- There are KSC guidelines for purchasing furniture, award items, and printing, etc.
- Be familiar with the ***Unauthorized Purchase List***. Be sure to document the approval if authorization is given
- Before formally disputing a charge on your account, first contact the vendor and attempt to arrange for a credit or correction on your account
- Sales tax and shipping charges cannot be formally disputed
- Disputes require 2 actions: Annotate “disputed” while reconciling and complete and fax Dispute Form to Bank



Reminders from Central Receiving

- In Order Log *description field*: include **part numbers** and full description of item; e.g., *coupling, 3/4" stainless steel, P/N 12345*
- Specify quantities: e.g. *15 each per lot; use separate lines for mixed supply items with varying quantities*
- KSC delivery address:
 - **NASA, Transportation Officer, M6-744**
 - **Attn: PC# _____/Name/Bldg/Room**
 - **Kennedy Space Center, FL 32899**
 - **Attn: Property Management (if tagging is required)**
- *Order Log* number (e.g. PC10334572) **MUST** be included on all shipping labels and packaging slips
- For Hazardous Material orders, the vendor **MUST** include an Material Safety Data Sheet (MSDS)
- If picking up a controlled/sensitive item, Cardholder **MUST** physically take the item to Central Receiving for proper tagging



Rebates

- **Rebates** – Cardholders must send all rebate checks to:

NASA Kennedy Space Center
Attn: Rebate Processor
Mail Code: GG-B
KSC, FL 32899

Be sure to include the Order Log number (e.g. PC10334572). NASA cannot accept checks made payable to the Cardholder; therefore, Cardholder must deposit the rebate check and write a personal check to NASA for the amount of the rebate and annotate the Order Log number in the reference note.



Helpful Tips

- Set-up ***User Preferences*** (e.g. funding data) before you press the create new Order Log button
- Credits can be reconciled against a previously reconciled debit line; however, never modify a previously reconciled line (i.e. *Do not change quantity or amount for the line*)
- Once Order Log is saved, funding data elements cannot be changed
- Un-reconciled Order Logs with zeroed line items **cannot** be removed from your account; therefore, the Order Log should be re-used for your next order



Helpful Tips

- Properly classify your Order Log line items by choosing the appropriate **Category Code**.
NOTE: **Category 99** shall ONLY be used for **Credits & Shipping Charges**)
- Use the **Comments Section** to document receipts, ODIN and 508 consideration, special approvals, disputes, and other issues
- Reconcile/approve early
- Refer to the KSC Bankcard Web Site
- Do not hesitate to call the KSC Bankcard Coordinator for help



Purchase Card Program - Changes

- Single transaction limit increased is **\$3,000**.
- When creating Order Logs citing “**Reimbursable**” funds, Cardholders are not required to enter ***Earmarked Item***
 - Reimbursable funds will be entered using the following charge code window fields: Fund, Fund Center, Cost Center, Internal Order Number and WBS element
 - The Fund related to reimbursable funds will continue to end with the letter “R” (i.e., ESAX22006R)
 - This change prevents a Cardholder from entering an incorrect Fund related to reimbursable funding (a Fund with an incorrect fiscal year)
- Cardholders can now use a combination of project, cost pool, and reimbursable funds on a single order log line item since all of these fund types now cite a WBS element. See example on next slide.



Example of Multiple Charge Codes

Item Detail - Line #6 - Modify							
Save Changes On This Item							
* Add A Charge Code *							
No	Amount	Pct.	Fund Internal Order	Fund Center WBS	Cost Center	Earmarked.Item Network	
1	24.75	25	EXCX22007R FC000000	62 820098.01.08.0601.01	62IS60		
2	24.75	25	ESAX22007D FC000000	62 046193.02.06.01	62AD01		
3	49.5	50	ESAX22006D FC000000	62-CNTRGA 003524.08.01	62AS40		
99		Total					
0		Left to Allocate					



ITAP and MFR 137 Requirements

- All IT purchases utilizing the purchase card are required to identify **BOTH** the ITAP Acquisition Plan ID and the MFR 137 Non-ODIN Waiver as required in [KDP-KSC-P-1838](#).

- ITAP
 - Each NASA directorate is required to develop an IT Acquisition Plan ITAP annually.
 - The ITAP ensures that NASA IT Governance requirements are satisfied for each IT acquisition.
 - All ITAP's can be found at <https://sp.ksc.nasa.gov/it/itac/ap/default.aspx>, organized by fiscal year.
 - Examples of IT Governance requirements are IT security requirements, enterprise architecture requirements and application portfolio requirements.
 - PCard requisitioners are required to verify that each IT Purchase satisfies the specifications for one ITAP Line Item Identifier (LIID).
 - PCard requisitioners are then required to document the ITAP LIID on the first 10 characters of the Item Description field for each item.
 - An example of an ITAP LIID is 11PH/06/04.
 - The KSC CIO may waive the requirement for an ITAP LIID on rare occasions.



ITAP and MFR 137 Requirements, Cont.

- MFR 137
- All NASA IT purchases are required to comply with Mission Focus Review (MFR) 137.
- Compliance requirements for MFR 137 are documented in [KDP-KSC-P-1838](#).
- PCard acquisitions of IT that meet MFR 137 requirements are required to reference a valid and applicable MFR 137 waiver number in the Comments field.
- PCard acquisitions of IT that do not meet the MFR 137 criteria are required to state this in the Comments field.



Mandatory Purchase Card Training

Setting Up Alternates in P-Card



How to Set up a Delegate

The screenshot shows the 'the P-Card Web Solution' interface. At the top, there are four dropdown menus: 'P-Card...', 'Find Queries...', 'Cardholder Reports...', and 'Center...'. A dropdown menu is open under the first 'P-Card...' menu, listing the following options: 'P-Card...', 'Order Log Templates', 'Reconcile', 'Act As...', 'Set Up Delegations', 'Preferences' (highlighted), 'Change Password', 'Log In Again', and 'Log Off'. A red arrow points from the top left towards the 'Preferences' option. The main content area displays a welcome message: 'Welcome to the P-Card Web Solution, BRANDI. You are currently logged into the P-Card system with an authorized role of & Purchasing & Center Coordinator. Select an option from the drop down menus above to begin using the P-Card Web Solution.'

The navigation drop down menus at the top of your browser window will be used throughout the application. Use these selections to go from place to place within the application.

Try not to use the back button on your browser unless absolutely necessary.



How to Set up a Delegate

- Type in Last Name of Delegate and Hit Find

Delegation Set Up

Add New Delegation

Name (Last, First): 

Start Date: End Date:

Active Delegations

<u>Name</u>	<u>Start Date</u>	<u>End Date</u>	<u>Delete</u>
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Credit Card Solutions, Inc.
Version 1.00 - Revision 0.00



How to Set up a Delegate

- The search queries the last name.
- Click Load

Employee Information						
Back to Delegations						
↑ Full Name ↓	↑ Address 1 ↓	↑ Address 2 ↓	↑ City ↓	↑ State ↓	↑ Phone No ↓	Load
BLUBAUGH, SUZANNE M	Bldg. M6-0399, Rm 2443E	OP-OS	KENNEDY SPACE CENTER	FL	(321) 867-1701	

- The query then loads the name. You can put an ending date if you wish. Click Add Delegation

Delegation Set Up	
Add New Delegation	
Name (Last, First):	<input type="text" value="BLUBAUGH, SUZANNE M"/> <input type="button" value="Find"/>
Start Date:	<input type="text" value="3/15/2012"/>
End Date:	<input type="text"/>
<input type="button" value="Add Delegation"/>	



How to Set up a Delegate

- You now have a delegate.
- You may have as many delegates as needed.

Delegation Set Up

Add New Delegation

Name (Last, First):

Start Date: End Date:

Active Delegations

<u>Name</u>	<u>Start Date</u>	<u>End Date</u>	<u>Delete</u>
BLUBAUGH, SUZANNE M	3/15/2012		