



CAMPBELL UNIVERSITY PROCUREMENT MANUAL

The procedures as outlined in this manual supersedes
all previous procurement policies and procedures

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INTRODUCTION

The Campbell University Procurement Manual is a resource for staff, faculty, or other individuals who purchase products, supplies, equipment and/or services with University funds. This includes purchases made with a Campbell Credit Card, purchase orders, petty cash, check requisition as well as legitimate purchases of goods and services purchased with personal funds and later reimbursed.

At Campbell University ("University"), procurement decisions are often made by staff and faculty in the schools and departments. The University expects these individuals to base purchases on sound business practices, accountability, best value, and compliance with sponsor, donor, and regulatory requirements. Individuals making purchases or planning to make a purchase must follow established University policies and procedures and must adhere to Federal, State, and local laws, rules, and regulations.

Please note that this manual is an effort to provide general guidance in the area of procurement and procurement related activities to the campus. The Procurement Department understands that certain departments (such as IT and Facilities) will require specialized operations and procedures. If the policies and procedures outlined in this manual will cause undue burden on your organization, or if there are areas that of procurement that require special exception, please reach out to the Procurement Department to work out a strategy that would best benefit Campbell University.

CONFLICT OF INTEREST AND RESPONSIBILITIES, CODE OF ETHICS, PERSONAL PURCHASES

All procurement activities conducted on behalf of Campbell University, whether performed by the Procurement Department ("Procurement") or other Campbell employees and non-employees, and whether made with non-federal or federal funds, must follow the Conflict-of-Interest Standards listed below. These standards are intended as a supplement to the University's existing conflict of interest policies.

1. Avoid the intent, appearance, and conduct of unethical or compromising practice in relationships, actions, and communications, including with subsidiaries or affiliates, or organizations that the President or Executive Committee controls. This does not include area hospitals and clinics with which we work closely but are not part of the University. When transacting with an affiliate or subsidiary, all staff must abide by the same standards within this section.
2. All personnel must diligently follow the applicable laws, policies and procedures using reasonable care and only the authority granted as an agent purchasing on behalf of the University.
3. Refrain from any private business or professional activity that would create a conflict between personal interests and the interests of the University. A conflict of interest would arise when the officer, employee, or agent, any member of that person's immediate family, their partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for contract.
4. Avoid purchasing goods or services from a vendor who participated in advising, developing or drafting the request for proposals or bidding criteria.
5. Refrain from soliciting or accepting money, loans, credits, or prejudicial discounts, such as the acceptance of material gifts, travel, or entertainment, or any kind of favor from present or potential suppliers that might influence or appear to influence procurement decisions. Certain circumstances may allow for material gifts, such as vendor provided meals and gifts for holidays. In these circumstances, the total value of the gift may not exceed \$75.00.
6. Handle information of a confidential or proprietary nature with due care and proper consideration of legal and ethical ramifications and governmental regulations. Bids and quotes submitted to the University are to be held in strictest confidence. Under no circumstances may University personnel give suppliers information about bids or quotes from competing sources unless directed by the President, the President's designee or when responding to a valid subpoena or court order. In such cases, University personnel must consult the General Counsel in advance for advice as to whether and how to respond.
7. Promote positive supplier relationships through courtesy and impartiality in all phases of the procurement cycle.
8. University funds cannot be used for personal expenses and purchases that are not made on behalf of the University or for use by the University. Purchases must be for the use and benefit of the University, regardless of intent to reimburse the University.

If an individual believes that they may have a conflict of interest, the individual must promptly and fully disclose the conflict to their supervisor and suspend participation in the procurement until the conflict question has been resolved. The supervisor is responsible for documenting the conflict and elevating it to the Procurement Department. This

section is not meant to replace or detract from, but rather supplements, the existing University Financial Conflict of Interest Policies.

Violations of the above standards are considered serious misconduct and will be referred to the appropriate supervisor or office for possible disciplinary action.

AUTHORITY TO ENGAGE IN CONTRACTS FOR GOODS AND SERVICES

Campbell University (University) Board of Trustees (Board) has sole responsibility and authority to enter into purchase contracts for goods or services on behalf of the University. Pursuant to University By-laws and Board actions from time to time, the Board may delegate certain powers to the President or other officers. The Board has delegated to the President contracting authority for goods and services up to \$500,000. Pursuant to University By-laws, the President may delegate certain powers to his staff. The President has delegated to the Vice President for Business & CFO contracting authority for goods and services up to \$500,000. Any and all contracts in excess of \$500,000 must be submitted to the Board or Executive Committee for approval.

In the event where there are multiple contracts to achieve a desired outcome, the sum total of the separate contracts determines contracting authority. For example, if Project X requires three separate contracts and the sum total of Contract A, Contract B, and Contract C is in excess of \$500,000, contracting authority rests with the Trustees.

Only in the rarest of circumstances will a special meeting of the Board or its Executive Committee be called to consider the approval of a contract. In the event you anticipate a contract requiring Board approval, please contact the Vice President for Business & CFO.

All contracts for the purchase of goods or services are to be vetted and approved prior to execution by the University's Director of Procurement and General Counsel. Contracts that are not vetted appropriately and approved by the aforementioned offices, will not be signed. Therefore, it is the responsibility of the one seeking execution of a contract for goods or service to allow ample time for processing and execution of the contract.

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This Purchasing Manual was approved by the University's President on **April 5, 2021** and will remain in effect until such time as any modifications are appropriately approved. The University's President or Board of Trustees may at their sole discretion revise by addition, reduction, correction, deletion, or upgrading any part or parts of the material within this Manual.

PROCUREMENT DEPARTMENT RESPONSIBILITIES

The Procurement Department is supervised by the Director of Procurement. The department is tasked with the following responsibilities:

1. The purchasing function shall be carried out in accordance with all provisions of Campbell University Policies. The Procurement Department shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its function, including those of Federal, State, and local agencies having jurisdiction and/or authority.
2. The department will provide prompt and efficient service to the University and campus personnel in procuring goods and services including:
 - Obtaining competitive price quotations that provide the best value for the requesting department;
 - Processing purchase orders (P.O.) on a timely basis;
 - Following-up with vendors to ensure that products or services are received in a timely manner;
 - Advising various departments regarding opportunities and alternatives that provide the best value.
3. Be aware of market trends, price changes, and new products that may best meet the University's needs at competitive prices. This requires conferring with vendors and manufacturer representatives regularly.
4. Construction Projects
 - Assist in the preparation of bid document and related details;
 - Publication of the project;
 - Bid Invitation to vendors;
 - Pre-Bid Conference;
 - Bid opening and evaluation process in consultation with the Director of Facilities Management.
5. Fixed Asset Inventory Control
 - Handling disposition of all surplus, unused/obsolete materials and equipment either through auctions or donations.
6. P-Cards / Credit Cards
 - Issue and control Credit Card use and expenses
7. Provide the Board of Trustees and University Administration with guidance and information on all noteworthy activities pertaining to the procurement effort.

NOTE: The Procurement Department will not assist employees of the University in making personal purchases.

PURCHASE REQUISITION PROCESS

A Purchase Requisition (RQ) is not a purchase order and, thus, cannot be sent to the vendor to procure products and/or services. Purchase Requisitions are internal forms that are used to establish purchase descriptions, price, method of funding, etc. A Purchase Order (PO) is a legally binding contract between a vendor and the University. An individual who places an order, promise an order, or otherwise contracts for the purchase of goods or services without the authority will be personally liable for payment to the vendor and subject to disciplinary action.

Detailed, purchase requisitions are submitted by the requesting department with all proper approvals. Any supporting documentation, such as quotes, proposals, order forms, etc., must be sent to the Procurement Department with the Purchase Requisition. A purchase must be made via the requisition process. Purchase of a product or service must not occur prior to issuance of a PO unless there is an emergency or if it is an approved Credit Card purchase under the [University Credit Card Policy](#) included in this Manual. In the event of an emergency (to avoid immediate danger to the safety of students, employees, or visitors), the purchase must be approved by the Procurement Department prior to making the purchase.

The steps to process a requisition are:

1. **Data Entry** - Requesting department prepares a purchase requisition using the [Purchase Requisition Form \("RQ"\)](#). The RQ should include the proposed vendor, full description of item or service, item number, unit of measure, quantity, price, model, brand, size, color, and delivery location.
2. **Budget Approval** – The RQ is reviewed and approved with signature by the Head of Department or Budget Supervisor. Approvers must ensure that there are sufficient funds prior to authorizing the RQ. RQ is then routed to your assigned Procurement Department personnel as outlined in the "[Procurement Assignments](#)" section of this manual.
 - **Additional Approvals.** Certain purchases will require additional approval. The approval must be in written form and may be submitted via email or printed and attached to the Purchase Requisition Form.
 - [Technology/systems/software](#) related RQs require advance authorization from the IT Services Department by submitting an IT Professional Services request through the IT Service Portal at <http://campbelluniversity.samanage.com/>
 - All technology-related purchases will be reviewed for accessibility for persons with disabilities as well as information security capabilities before approval will be given.
 - [Marketing, Campbell Branded, and Logo](#) related RQs must obtain authorization from the Assistant Vice President of University Communications and Marketing;
 - [Construction, Grounds, Facilities](#) related RQs must obtain authorization from the Director of Facilities Management;
 - [Events/Group](#) related RQs must obtain approval from the Health and Safety Committee during periods when such approval is required by the President. Please contact the Procurement Department if additional clarification is needed.
 - [Gift Cards](#) must include a statement from the receiver indicating receipt of gift card with reference to type of card, dollar amount, name, and contact information in the form of a phone number or email address. Additional information is available in the Gift Card Policy in this manual.

- **Contracts/Agreements.** When a contract or agreement is part of the Purchase Requisition, the requisition will follow the **Contract Review Process**. This process is outlined in the [Contract Review Process](#) section in this manual.
3. **Source/PO Creation** – Once all required documentation has been provided, the RQ is routed to the Procurement Department to be processed into a PO. Copies of the PO are distributed as follows:
- Original copy to vendor;
 - Accounts Payable (A/P);
 - Requesting department;
 - Procurement records.

The time it takes to process a RQ to a PO depends upon how long it takes to go through the departmental approval path as well as the complexity of the PO. Procurement must also have all required documents before proceeding.

If ordered item is not received on a timely basis, Procurement will follow up with vendor.

If the invoice amount exceeds the PO, Procurement will reach out to the affected department to secure additional funds to pay the invoice or plan alternative action.

Under no circumstances is the product or service to be delivered or rendered at an employee's residence. All deliverables must be addressed to the school, Mail Office, or Will-Call. Note: *exception may be made during a pandemic or other emergency event with the approval of a Vice President or other division head.*

All vendors providing service on site are required to provide a Certificate of Insurance confirming commercial general liability, automobile, and workers' compensation coverage, naming Campbell University as additional insured with the following minimum coverages where applicable:

1. Professional Services Errors and Omissions Liability, with minimum annual limits of \$5,000,000 per claim or occurrence and in the aggregate.
2. Auto Liability Insurance with minimum annual limits of \$1,000,000 per claim or occurrence and \$3,000,000 in the aggregate
3. Professional and Commercial General Liability insurance with minimum annual limits of \$1,000,000 per occurrence and \$3,000,000 in the aggregate.
4. Cyber Liability insurance covering loss or disclosure of Customer Data, with minimum annual limits of \$5,000,000 per claim or occurrence, and in the aggregate.
5. Workers' Compensation insurance as required by applicable law.

Vendors are to send invoices to the following:

Campbell University
Purchasing Office
P.O. Box 275
Buies Creek, NC 27506

Upon receipt of items and/or services, the receiving Department should promptly return the completed **Campbell University Receiving Report form** to Procurement to avail of discounts offered for timely payments and avoid penalties for late payments. Note: Campbell University Receiving Report forms are obtained by submitting a request to your assigned Purchasing Specialist.

Failure to follow this process may result in the employee being held responsible for costs incurred.

PURCHASE ORDER NO.

Date: _____

Date: _____

Date: _____

FISCAL YEAR-END DEADLINES FOR CONTRACTS, COMMITMENTS, EXPENDITURES AND OTHER TRANSACTIONS

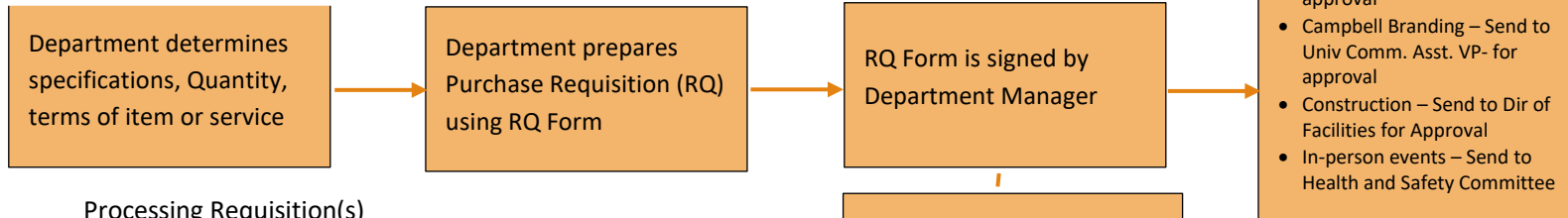
The fiscal year ends May 31 of every year. To permit timely handling of documents as required by the University, the following deadlines for the processing of purchase orders (PO), contracts, personal service agreements, payments and other transactions have been established. Your assistance and attention to in meeting these deadlines is necessary to ensure an orderly closing of University financial records and the audit of the financial statements that ensues following the close. As with any close of a fiscal year, the Business Office team members are committed to assisting you with your procurement and reimbursement needs. We will continue to process all documents in accordance with University requirements, in support of operational, educational and research activities during this period. It is very important not to hold any documents that require processing, even if the requested deadline has passed. Instead, please submit all documents your office has received.

Purchase Requisitions (PR), Check Requisitions, contracts, personal service agreements, payments and their supporting documents must be received in the Procurement Department by **March 30** if they are to be reflected and processed in the current fiscal year. Procurement Services will make every effort to expedite and process requests in support of University business needs and meet the defined deadlines.

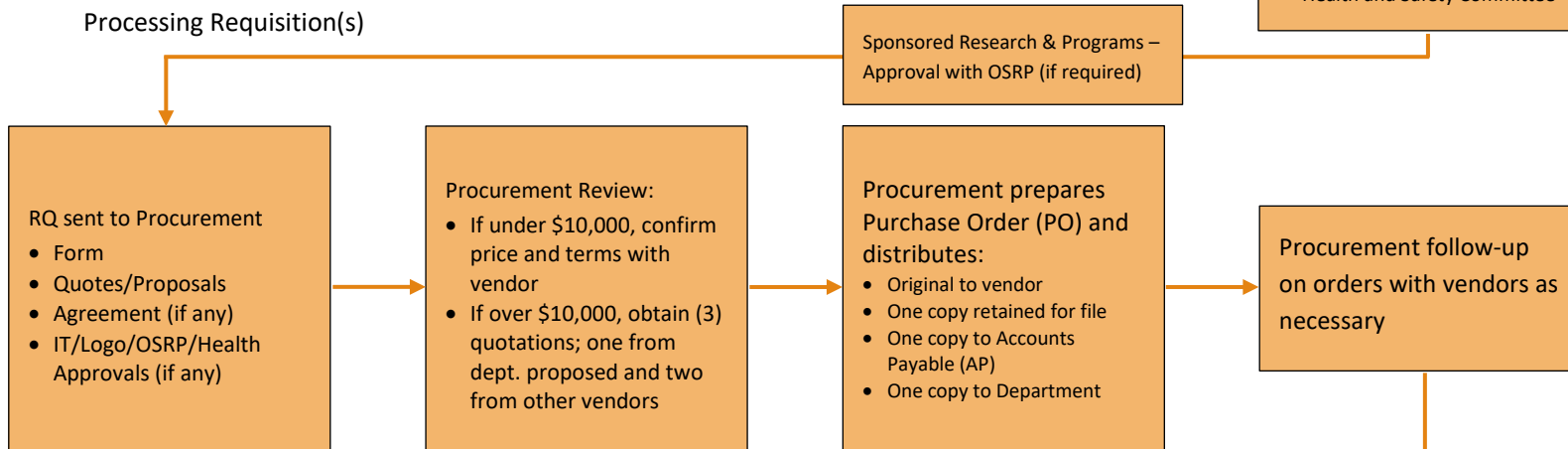
Purchases that need to be processed beyond the March 30 deadline must be approved by each department head with justification on the late submission. Every late submission will be reviewed for approval on a case-by-case basis by the Procurement Specialist and Director of Procurement.

PURCHASE REQUISITION WORKFLOW

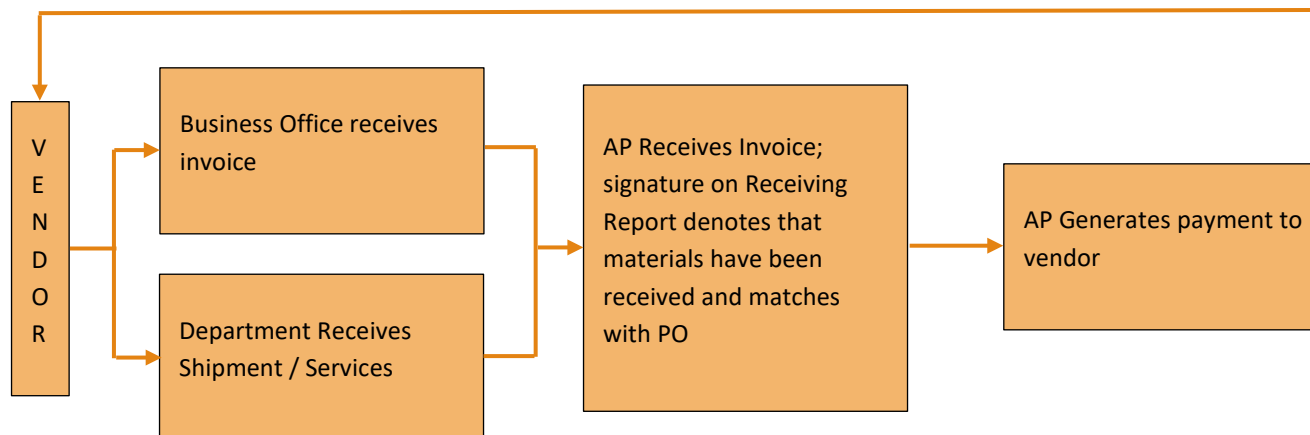
Preparing Requisition(s)



Processing Requisition(s)



Processing Purchase Orders(s)



CONTRACT REVIEW PROCESS

Definition of Contract. A contract is any agreement between the University and another party which is enforceable by law. In a contract, legally enforceable commitments are made by and/or to the University. The University considers all forms of agreements that are enforceable at law (e.g. letters of agreement, memos of understanding, etc.) a contract regardless of title.

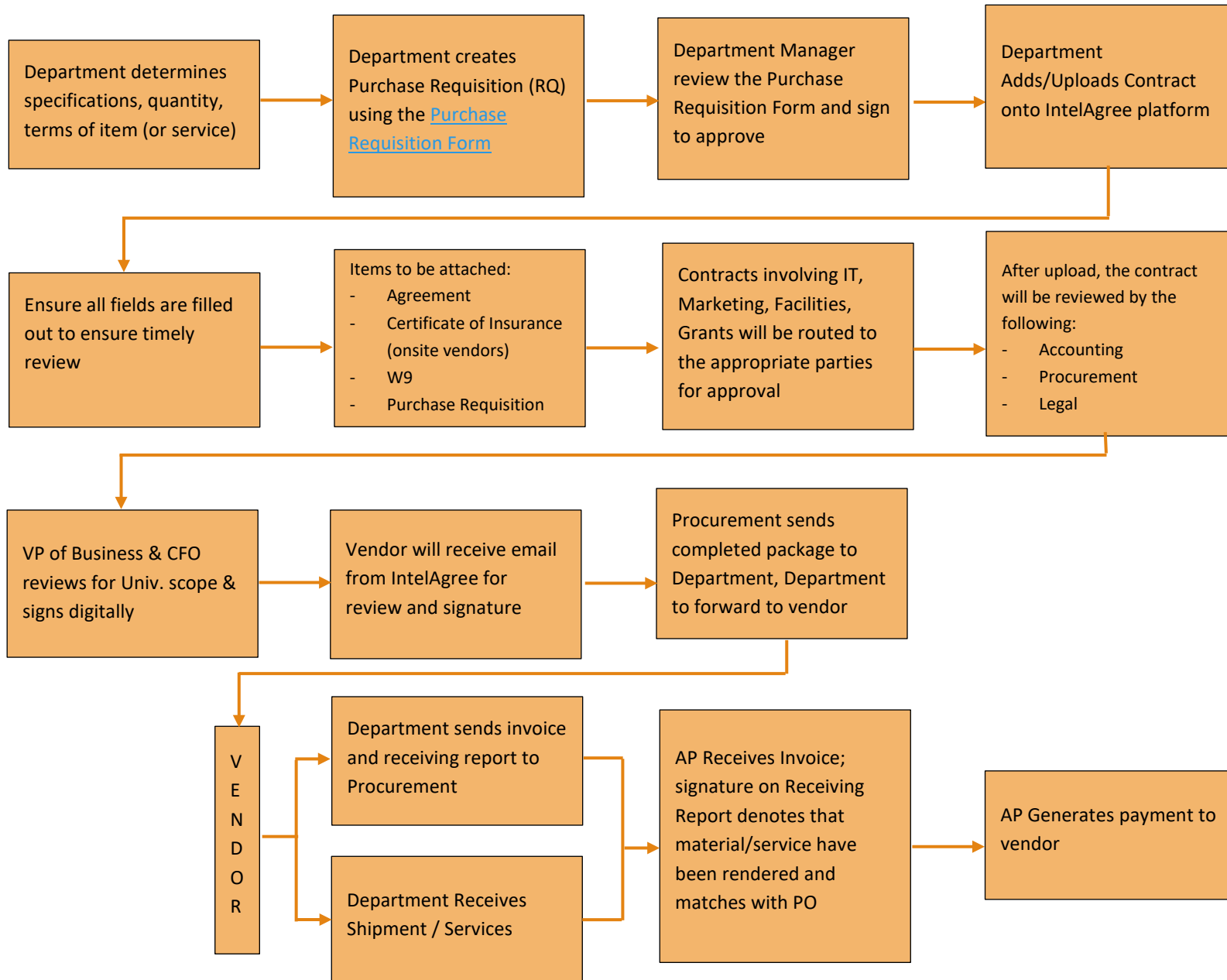
If a University employee signs a contract that the employee is not authorized to sign, the individual runs the risk of personal liability for the contract.

Processing a Contract. The Contract Review Process is an effort to streamline and track the review, funding, negotiation, and execution of the contract. It allows for a thorough examination of a legal agreement before it is signed to ensure that the statements in the document are clear, accurate and consistent with the University's mission and, policies. Contracts must be reviewed following the procedure outlined.

Department heads have designated specific staff to submit requests for contract approval through our contracts management platform, IntelAgree. Authorized users can access IntelAgree [here](#).

Note: if a contract does not involve the expenditure of University funds, please reach out directly to the Office of General Counsel to process. The project will not need to go through the process below.

CONTRACT REVIEW WORKFLOW



PROCUREMENT ASSIGNMENTS

Name	Commodity Code	Department
Theresa Humbert 910-893-1254 Humbert@campbell.edu	TH	IT Services College of Arts & Sciences (CAS) CUSOM ENGR LFSB Bursar Business Office Adult and Online Education Finance Grants CPHS Human Resources Humanities Physical Education President's Office Special Program Staff Development Student Services
Lana Wyatt 910-893-1446 Wyatt@campbell.edu	LW	Credit Cards
Michelle Bezgela 910-893-1639 LBezgela@campbell.edu	MB	Amazon Assets Automotive Blanket Orders Campus Safety Facilities Furniture Physical Plant PPE
Laura Burdette 910-814-4342 ITProcurement@campbell.edu	LB	Technology Procurement

BIDDING REQUIREMENTS & PURCHASE LIMITS

Goods

- **Under \$10,000 (Micro Purchase)**

The procurement of goods and services in amounts of less than \$10,000 shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. This may include verbal or written quotations from one or more vendors. These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and are subject to review and approval by Procurement.

- **\$10,001 – \$90,000 (Small Purchase)**

Purchasing transactions from \$10,000 to \$90,000 threshold shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. Additional quotations may be requested. These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and are subject to review and approval by Procurement.

- **Purchases over \$90,000 (Large Purchase)**

Purchasing transactions over the \$90,000 threshold shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. **A minimum of three written quotations will be obtained.** These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and are subject to review and approval by Procurement. The Procurement Department will seek to utilize Group Purchasing Organizations (GPO) or pursue competitive bidding as deemed appropriate.

Services

- **Under \$50,000**

The procurement of services in amounts of less than \$50,000 shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. This may include verbal or written quotations from one or more vendors. These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and is subject to review and approval by Procurement.

- **\$50,001 – \$250,000**

Service transactions from \$50,000 to \$250,000 shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. **A minimum of three written quotations will be obtained.** These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and is subject to review and approval by Procurement.

- Construction services may require a contractual agreement with additional payment and/or performance bonds. Please contact Director of Procurement for additional details.

- **Services over Bid Threshold \$250,000**

Transactions over the \$250,000 threshold shall be made with as much competition as is practical and deemed necessary by the Director of Procurement. **A minimum of three written quotations must be obtained.** These quotations may be obtained by either the responsible Procurement Staff or the requisitioning department and are subject to review and approval by Procurement. Services may be competitively bid as deemed appropriate by Director of Procurement. Please reach out to the Director of Procurement as early as possible as the procurement portion may add a delay to the project.

- Contracting for construction services may require a contractual agreement with additional payment and/or performance bonds. Please contact Director of Procurement for additional details.

Note: The use of Grants funding may be subject to additional constraints, rules, and regulation. The more restrictive threshold will apply when using grant funding. Please contact the Director of Sponsored Research and/or the office of Sponsored Research and Programs (OSRP) for additional information.

EXEMPTION FROM BIDDING REQUIREMENTS

The followings are some examples of other types of projects/contracts not subject to the usual competitive bidding requirements:

Group Purchasing Organization (GPO) A GPO assists entities in realizing savings and efficiencies by aggregating purchasing volume and using that leverage to negotiate discounts with manufacturers, distributors, and other vendors. In order for the University to utilize a GPO, the University must obtain all documents from the awarding agency and ensure that all documents are valid. These documents include:

- Verification of advertisement;
- Bid documents, including the specific terms and conditions of the bid, including the clause which gave notice to potential bidders that other agencies may purchase/lease identical items at the same prices and upon the same terms and conditions;
- The award of contract or Letter of Agreement (LOA);
- Verification that the awarding agency actually purchased/leased the personal property; and
- Extensions of the contract, if any.

State List. Competitive bidding may be waived when purchasing materials, equipment, or supplies through the North Carolina Department of Administration or utilizing its eProcurement service. eProcurement is a supplier hub that offers a wide variety of commodity and information technology products at prices that have been assessed to be fair, reasonable, and competitive. Visit <https://eprocurement.nc.gov/> for general guidelines regarding eProcurement policies and procedures.

Professional Services. Services in certain disciplines such as financial, IT, economic, accounting, architectural, engineering, and legal required by the University may be contracted without competitive bidding.

Emergencies. Competitive bidding may be avoided when repairs, alterations, work, or improvements are necessary to avoid danger to life or property in an emergency.

Purchase of Educational Materials. The University may purchase library materials, supplementary books, educational films, audio-visual materials, text materials, workbooks, instructional computer software packages or periodicals in any amount needed for the operation of the University without taking estimates or advertising for bids.

Sole Source. In cases where there is no practical value in soliciting for materials and services since it appears that there is only one source available, it may be possible to make the purchase without formal bidding. The Director of Procurement will evaluate each request and determine whether a sole source acquisition is appropriate. The following are helpful in making this determination:

- A product description, including quantity and technical features;
- An explanation of why the product is unique. This presents the technical features required;
- Effort to determine no known equal from other vendors;
- An explanation that the purchase price is reasonable;
- A certification from the vendor why these products may not be available from others.

BLANKET PURCHASE ORDER

A “Blanket Purchase Order” (BPO) is a purchase order issued to a vendor allowing for multiple purchases to be made during the fiscal year.

BPOs are generally used for the following types of purchases:

- As-needed instructional and non-instructional supplies - consumables only;
- Multiple purchases of repetitive goods or services for a specific time period (usually a year);
- Minor repairs and servicing of equipment.

BPOs CANNOT be used for the following purchases:

- Purchases of computers, electronics, any single item/good that is \$500 or more, or any restricted item/good (e.g. IT approval required);
- Any goods or services that require bid - when the purchase is equal to or greater than the current quote/bid threshold, whether for a single item/service or in the aggregate;
- Fixtures, Furniture, or Equipment.

Procurement approves and issues all BPOs upon entry of an approved requisition to Procurement by the requesting department. The requisition must: (1) state the name of the department; (2) describe the commodity or service; (3) list the persons authorized for purchase and/or payment; (4) a not to exceed amount; (5) an effective period.

The BPO is only valid for the specified period of time as indicated on the order and the amount it is funded. Once the effective period has passed or the funding has been depleted the purchase order is no longer valid. When the remaining balance drops and the requirement still exists for the BPO, funds can be added. Additional goods/services should not be ordered until the funds increase is applied to the order. Overspending a BPO is subject to the same process as any other unauthorized purchase.

If a certain level of competition is needed for a particular BPO, Procurement Staff will consult with the Director of Procurement.

Should an employee make an unauthorized purchase, it will be viewed as a personal transaction. The University will not assume responsibility, and reimbursement from the University funds will not be made.

Requests for BPOs are to be sent to Michelle Bezgela at (LBezgela@campbell.edu) for processing.

BPOs do not carry over and must be renewed every fiscal year.

HONORARIUM

An honorarium is a gift paid to an individual in appreciation of a task performed on behalf of the University. It is not a payment for services rendered or for conducting work related to an individual's regular duty. This is given to employees or student in recognition for outstanding achievement in advancing the mission and/or reputation of the University. Since these participants are providing "pro bono" service, it is appropriate to offer an honorarium as an appreciation for their time and effort spent.

- Contact the Office of Sponsored Research and Programs for inquiries on honorariums to be charged to a grant or sponsored activity;
- Department prepares the "Request for Approval of an Honorarium" approved by the Head of Department. This letter is the justification of the honorarium;
- Department prepares the Check Requisition form signed by the departmental authorized approver. The Check Requisition with the approved request and a "Request for Taxpayer Identification Number and Certification" (W-9) is forwarded to Procurement. The W-9 is for tax reporting purposes. The W-9 and any forms with confidential personal information such as Social Security Number must NOT BE emailed. Instead, instruct individuals to upload the W-9 form to an Egnyte folder set up specifically for this purpose.
- Procurement will review and forward this with attachments to Accounts Payable for processing. There is no need to have a contract or agreement to complete this transaction;
- The check is processed and returned to the requesting department if requested. If not, the check can be sent directly to the recipient.

The check must be presented by the requesting department to the recipient along with the "Letter of Offer" and an "Acceptance of an Honorarium" must be filled by the recipient and returned to the Procurement Department for documentation. Failure to follow this procedure may disqualify the requester for future honorarium requests.

Honorariums are only for Campbell employees or students. External Guest Speakers, Performers, Musicians, or Referees must use the template provided in IntelAgree for those agreements with a Check Requisition and W9.

CAMPBELL UNIVERSITY REQUEST FOR APPROVAL OF AN HONORARIUM

Payee Information

Last Name _____ First Name _____

W9 _____ Student ID _____

Address _____

City _____ State _____ Zip _____

Employee (Check one): ☐ Yes ☐ No

Amount of Honorarium \$ _____

Justification:

Requested by _____ Date _____

Title _____

☐ Approved ☐ Denied

Comment _____

Department Head _____

Name _____ Date _____

CAMPBELL UNIVERSITY
LETTER OF OFFER AND ACCEPTANCE OF AN HONORARIUM

This will confirm our invitation to you to provide service at _____ on
(date) _____ on the topic of _____.

We are offering you an honorarium of \$ _____. If this
agreement is satisfactory to you, please sign below, and return in the attached self-
addressed stamped envelope.

Accepted:

_____ Date _____
Signature

Print Name

UNIVERSITY CREDIT CARD POLICY

Campbell University Credit Cards (Credit Card) are intended for special circumstance procurement which calls for greater flexibility on transactions. These cards are the property of the University and shall not be used for personal reasons. It is the responsibility of employees assigned Credit Cards to use the card in a responsible manner. The employee assigned the card will be held accountable for all charges made on the card as well as the recording and reporting required to document its use. The privilege to use a Credit Card is contingent upon following the University Credit Card Policy.

University Credit Card Policy:

- Credit Cards are intended for individual use and credit limits are set accordingly.
- Credit Cards are to be used for official business only and their use is limited to payment of expenses related to University business.
- Credit Cards must be secured at all times. For security, do not email or fax credit card information.

Acceptable Uses:

- **Travel**; such as flight, lodging, rental cars, and meals.
- **Food**; may only be made where University business is being conducted. The nature of the food expense must be detailed on the University Credit Card Log. **Tips may be included at a maximum rate of 18% of the total bill.**
- **Fuel**; only when utilizing a rental vehicle. In this case, mileage reimbursements are not allowed.
- **Emergencies**; Credit Cards may be used in lieu of emergency purchase orders, cash purchases and advance check requests.

Prohibited

- **Supplies and Services**; Purchase Orders are to be utilized.
- **Inter-department Procurement**; Purchase Requisitions are used for internal purchases from departments at the University.
- **Cash Advances**; Under no circumstances are Credit Cards to be used for cash advances.
- **Personal Purchases**;
- **Alcohol, Gambling, Illicit Drugs**;
- **Purchase of Securities or Insurance**;
- **Technology**; Computers, Tablets, Monitors may not be purchased unless written approval was obtained from IT Services.
- **Court Costs, Tax, Fines, Bail or Bond Payments.**

Reporting and Documentation

- **Proof of Purchase;** All expenditures using the Credit Card must include proof of purchase in the form of receipt or invoice. **Proof of purchase must clearly state the item purchased, quantity, and dollar amount.**
- **JPMorgan Credit Card Reconciliations:** All expenditures using the Credit Card must be documented using the on the [JPMorgan PaymentNet platform](#). Receipts must include date, vendor, and amount. Notes on the transaction must be clear and thorough. The Business Office may request additional clarification.
- **Credit Card Statements;** Credit Card statements are run by the Credit Card vendor on the 28th and are available online by the 29th or 30th of each month.
- **Authorization;** All expenses using the Credit Card must be authorized and verified by the Department Head or Supervisor using the Transaction Approver role in JPMorgan PaymentNet.

Failure to abide by the University Credit Card Policy and timely submit of documentation and statements will result in account block or termination of card privileges with or without notice as well as possible employee discipline.

Special circumstances may arise where the University Credit Card Procedure Policy may be waived. These instances will require written approval by the Director of Procurement on an individual basis.

Obtaining and Using the Credit Card

1. An employee whose position requires the use of a Credit Card shall obtain and sign the **University Credit Card Policy Form** and **Approving Official Request Form** included with this Manual. **Additionally, all credit card users are subject to a credit check conducted by Human Resources. This information will be reviewed prior to credit card issue.** The form should be approved by the Approving Official and/or Budget Official and subsequently, the Director of Procurement. A Credit History Check will be run by Human Resources. The Procurement Department will request a card in the name of the designated employee.
2. Upon receipt of the card, the Procurement Department, will contact the employee who must complete and sign the **Cardholder Agreement** (included in this Manual) acknowledging receipt of the card and an understanding of the dollar limits and guidelines for using the card.
3. At every instance of Credit Card use, proof of transaction (in the form of a sales receipt, invoice, or proof of payment) indicating the description, amount of the purchase and the name of the vendor must be retrieved and maintained for reconciliation and payment. It is advisable to take a photo of the proof of transaction for safe keeping.
4. If ordering by mail, maintain and attach a copy of the order form with the billing statement if the vendor fails to provide a sales/transaction slip.
 - a. **Telephone and Mail Orders** - Use the **Campbell University Credit Card Log** to log all orders made by phone. The log should be maintained in the same billing cycle as your Credit Card. This log is required to be sent with the billing statements.
 - b. **Online Orders** - When ordering online through the internet, be sure that you are ordering through a secure website. There are two ways to ensure you are on a secure website: 1) Look at the web address in the browser and make sure it starts with https://; 2) look for a closed padlock image next to the web address. When you click on the padlock you should see a message that states the name of the company and that "The connection is secure and/or encrypted." Obtain confirmation of the order for tracking purposes. Print

the confirmation as this may be the only documentation you may have for reconciling the monthly statement and will be required for payment if in lieu of a sales receipt.

5. The monthly billing statement will itemize all transactions charged to the Credit Card. The statements are dated the 28th of the month and individual statements should be received by the 1st of the following month. Upon receipt of the monthly statement, the cardholder will:
 - a. Review the statement for accuracy.
 - b. Indicate the appropriate budget number(s) for each transaction. If charging more than one account per transaction, indicate the dollar split to be applied to each account. The administrative fee must be charged to the same account numbers(s) as the transaction.
 - c. Attach all sales receipts and necessary supporting documents to the statement. After signing, printing name, and indicating the budget number, e-mail all supporting documents to **Procurement@campbell.edu** on or before the day the 5th of the month following the statement date.
 - d. Contact the Office of Sponsored Research and Programs for the process to reconcile expenditures to be charged to your grant accounts.

If an item is returned, attach and/or verify any credit vouchers received or applied to the monthly statement where the credit appears and indicate the appropriate account number for the credit.

Incorrect Charges – Contact the vendor first to try and resolve the dispute. If this approach is not successful, contact the credit card issue (bank). You have sixty (60) days to dispute a charge.

Suspension Procedures – Prompt receipt of your Statement of Account is an essential part of the Credit Card process that allows making payments on a timely basis. Campbell's Credit Card charges must be paid in full every month in order to keep the card active.

If the Procurement Office does not receive your Statement in the requested timeframe, your name, and the amount outstanding will be forwarded to your college administrative head, Dean, Provost, Vice-President and the Budget Manager as applicable. The outstanding amount will be charged to the appropriate budget;

Your Credit Card privileges may be suspended or revoked at the discretion of the Director of Procurement.

Lost or Stolen Cards – Immediately notify (in order), the bank, your designated Approving Official, and the Director of Procurement. The number for reporting lost or stolen cards is (800) 397-1253. Be prepared to provide the following information:

Your name;
 Card number;
 Business Address;
 Phone numbers associated with the account;
 Date reported lost.

Changes to Cardholder Information – Changes to cardholder's name, address, organization, 30-day or single purchase limit should be reported to the Director of Procurement, by completing the **Request for Changes to the Credit Card-Cardholder information** included in this Manual.

Closure of Account - Upon terminating employment with CAMPBELL, you must return your card to the Director of Procurement and complete the **Request to Close Credit Card Account** included in this manual.

If you transfer to another department, return your Credit Card to the Director of Procurement. If your new assignment requires a Credit Card, a new Request for Credit Card form will be required.

On an annual basis, the Director of Procurement, will provide a list of all Credit Cards issued for a department's employees to each Department Head. A physical inventory of all Credit Cards within the organization will be taken by the Approving Official and reported back to Procurement.

I acknowledge receipt and understanding of the foregoing policies and procedures.

Cardholder Signature: _____

Cardholder Name: _____

Date: _____

CAMPBELL UNIVERSITY CREDIT CARD ACCOUNT SETUP

Name: _____ Birthdate: _____

Title: _____ Phone: _____

Email: _____ Mobile: _____

Department: _____ PO Box Address: _____

Credit Limit Requested: _____ Home Address: _____

Credit Check Completed from HR: ☐ Yes ☐ No

Seasonal Limits: ☐ Yes ☐ No

If Yes, provide details: _____

I hereby certify that the information above is true and complete to the best of my knowledge.
I acknowledge that any false statements on this application may be cause for termination.

Applicant Signature Date

☐ Approve ☐ Deny

Name of Approving Official Date

Approving Official Signature Date

☐ Approve ☐ Deny

Procurement Director Signature Date

CAMPBELL UNIVERSITY CARDHOLDER AGREEMENT

I agree to use the Campbell University Credit Card only for approved business expenses in accordance with the University policies and guidelines. I understand and acknowledge that use of the Credit Card may not be delegated to anyone other than myself as cardholder.

I have read the University Credit Card Policy and agree to abide by its provisions stated. I acknowledge that use of the Credit Card for any purpose other than for University approved business expense is prohibited and is grounds for corrective action, up to and including termination of employment. In addition, I will reimburse the University for such charges.

The Commercial Card Agreement between the university and the credit card issuer allows the issuer to exchange or otherwise disclose cardholder confidential information its affiliates, MasterCard International, Inc. or Visa U.S.A., Inc., service providers and other authorized third parties in connection with the issuer's provision of credit card services. I hereby consent to disclosure of my personal and confidential information by the credit card issuer for that purpose.

I agree to a background and credit check conducted by a company selected by Human Resources on an as needed basis.

I agree to surrender the Credit Card immediately upon retirement, termination, change of position, or upon request of an authorized representative of the Procurement Department. I understand that the use of the card after privileges are withdrawn is prohibited.

If the card is lost or stolen, I will immediately notify the issuing bank by telephone. I will confirm the telephone notification by mail, email, or facsimile from the issuing bank with a copy to the Procurement Department. I understand that failure to notify the issuing bank of the theft, loss or misplacement of the credit card could make me responsible for any fraudulent use of the card.

Bank Contact

Customer Service
(800) 397-1253

Cardholder

Signature: _____

Name: _____

Title: _____

Card# (last 4): _____

Date: _____

Procurement Department

Signature: _____

Name: _____

Title: _____

Date: _____

CAMPBELL UNIVERSITY

REQUEST FOR CHANGES TO CARDHOLDER INFORMATION

ONLY FILL INFORMATION BELOW THAT IS TO BE CHANGED:

Cardholder Name: _____

Cardholder Title: _____

Site/Department: _____

Phone Number: _____

Credit Limit: _____

Cardholder

Supervisor

Signature: _____ Signature: _____

Name: _____ Name: _____

Card#: _____ Title: _____

Expiration Date: _____

CAMPBELL UNIVERSITY REQUEST TO CLOSE CREDIT CARD ACCOUNT

RETURN CREDIT CARD TO PROCUREMENT DEPARTMENT:

Cardholder Name: _____

Cardholder Title: _____

Site/Department: _____

Reason for Request:

- ☐ Transfer
- ☐ Resignation/Retirement
- ☐ Other: _____

Cardholder

Supervisor

Signature: _____ Signature: _____

Name: _____ Name: _____

Card#: _____ Title: _____

Expiration Date: _____

WEX FLEET SERVICES FUEL CARD

WEX is the authorized vendor that provides and maintains fuel credit cards for University employees' purchase of gasoline, diesel and other designated motor fuels at stations with extensive accessibility. **All fuel purchases for University-owned vehicles must be purchased with this card.**

The WEX Fleet Card provides the following benefits:

- Accepted at 95% of U.S. fuel stations (find a [WEX accepted station here](#))
- Automatic Accounting (each card is assigned to a University vehicle)
- Security (a personal 4-digit PIN is assigned to every user; do not provide this PIN to any other person)
- Spending Controls (daily maximum use may be set to control costs)
- Repairs/Roadside Assistance (may be charged on the card instead of a Campbell Credit Card)

Use:

- You may fuel your vehicle at any of the locations that accept WEX.
- At the pump, insert your card, type in your personal PIN and begin fueling. Note: newer fueling stations will request the current miles from the vehicle's odometer. Please note your odometer reading before stepping out of your vehicle.
- The pump may ask if you require a receipt, you may accept it for your records. The Business Office will have a record of your transaction on the WEX Management platform for every transaction. The Business Office will automatically bill your departmental budget code monthly.

CAMPBELL UNIVERSITY
WEX ACCOUNT/PIN SETUP

Date: _____

Phone: _____

Budget Code:

PO Box Address: _____

I hereby certify that the information above is true and complete to the best of my knowledge. I acknowledge that any false statements on this application may be cause for termination. By signing below, I acknowledge receipt and understanding of the foregoing policies and procedures.

Applicant Signature	Date
---------------------	------

☐ Approve ☐ Deny

Name of Approving Official _____ Date _____

Approving Official Signature	Date
------------------------------	------

☐ Approve ☐ Deny

Procurement Director Signature	Date
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CHECK REQUISITIONS

Check Requisitions are used to request payment for services rendered by individuals or for certain activities not invoiced (conference registrations, honorariums, etc.). Do not attach check requisitions to invoices or submit check requisitions in duplicate. Check requisitions should be coded with the proper budget number and signed by the Department Head (original wet signatures).

Check Requisitions must be filled out completely (payee name, address, Employee/Student ID Number, etc.) using the Check Requisition Form. If the payee is a person who is not an employee or student, obtain a completed W-9 from the payee as provided in this Manual. Incomplete check requisitions will not be processed and will be returned to the department. Supporting documentation describing the nature of the requisition must be attached.

Under normal circumstances, the processing of check requisitions will take (10) business days after being received in Accounting. Please plan accordingly as the Accounting Department will not be responsible for expedited or delayed processing.

Under no circumstances may the check requisition process be used in lieu of a Purchase Order.

Check Requisitions that include fillable forms and/or applications must request the check to be sent to department for the department to send out. The requesting departments should keep a copy of all documents sent.

Note(s): (1) If funds are associated with a grant or sponsored activities approval and/or prior approval will be required from the Principal Investigator, his or her direct supervisor and the Office of Sponsored Research and Programs. (2) Check Requisitions may be submitted to reimburse employees who have used personal funds to make purchases; however, the reimbursement is contingent on approval from the Procurement Department. (3) Federal/Government/State/County/City funds such as and not limited to EBT/PEBT/SNAP may not be used for reimbursement.



CHECK REQUISITION

Today's Date: _____ Date Check is Needed: _____

INCOMPLETE CHECK REQUISITIONS WILL BE RETURNED

Information to be Printed on Check

CU ID / Vendor ID Number of Payee: _____ (REQUIRED)

Please check one of the following, if applicable: ☐ Campbell Employee ☐ Campbell Student

Payee Full Name: _____

Payee Address: _____

Payment Description: _____

Amount: _____

Budget Line to be Charged: _____ (REQUIRED)

Required Approvals

Requester's Signature: _____ Date: _____

Printed Name: _____ (REQUIRED) Department: _____

Approver's Signature: _____ Date: _____

Printed Name: _____ (REQUIRED) Department: _____

Secondary Approver's Signature (IF APPLICABLE): _____ Date: _____

Printed Name: _____ Department: _____

IF THIS PORTION IS NOT COMPLETED, THE CHECK WILL BE MAILED DIRECTLY TO THE PAYEE

Checks may no longer be picked up at the Accounting Office. If the check is to be sent via CAMPUS MAIL, please agree to and sign the following statement of responsibility and note the contact and department information:

By requesting to have the check sent via CAMPUS MAIL, I accept responsibility for the check once it leaves the Accounting Office. I understand that I will be required to complete delivery/postage and request a stop payment and re-issuance if the check is lost.

Signature: _____ Extension: _____ E-mail: _____

Printed Name: _____ (REQUIRED) Department Name: _____

PLEASE ALLOW 10 BUSINESS DAYS FOR PROCESSING FROM THE DATE ACCOUNTS PAYABLE RECEIVES THE CHECK REQUISITION
CONTACT TRACY (x1445) OR LANA (x1446) WITH QUESTIONS REGARDING THIS FORM, VENDOR IDS AND NEW VENDOR WS SUBMITTALS.

For Accounting Office only:

Director of Procurement, Thomas Pham

Signature: _____ Date: _____

GIFT CARD POLICY

Gift Card usage, as a form of payment to employees, is prohibited for the following purposes:

- Incentives
- Awards
- Door prizes
- Gifts for personal accomplishments, including retirement
- Holiday or other occasion gifts
- Compensation

This policy applies to both direct payment for gifts and to reimbursement for the purchase of gift cards. This policy does not apply to gift cards purchased with personal funds.

Tax Treatment of Gift Cards for Participation in a Research Study. In order to promote participation in a research study it may be necessary for participants to receive incentive payments in the form of cash or gift cards. When cash or gift cards are awarded, the University must comply with IRS regulations, and federal, state, and sponsor requirements.

The University must report the value of the gift card to both the participant and the IRS if the cumulative total amount per participant is \$600 or more in the calendar year. If the participant is a University employee, the value of the gift card is reportable in the same manner if participation in the study is not within the scope of their employment with the University.

Gift cards of any denomination are defined by the IRS as cash equivalent and are therefore considered taxable income to the participant. The IRS does not exempt “de minimis” amounts from taxable income that are made in the form of cash or cash equivalents, e.g. gift cards.

GIFT CARD PROCEDURE

Gift cards, from both Barnes & Noble itself as well as from many other vendors and businesses, may be purchased from Barnes & Noble at Campbell University at *The Bazaar* located in the Oscar N. Harris Student Union. Gift cards can be purchased for a variety of business purposes including, but not limited to: compensation for research, survey participants, gifts, raffles, etc. Gift cards are not eligible for the standard 15% off departmental discount. Gift cards purchased with a requisition form will be invoiced to Campbell Accounting at the end of every month and from there will follow Campbell policies and procedures for departmental purchases. Staff are responsible for understanding and complying with all associated financial controls and responsibilities.

To purchase a gift card in store:

- **Form** - Obtain and complete an Internal Requisition Form (can be obtained from Procurement). The form must be legible and include the budget code to be charged as well as the name and signature of the Budget Manager (under "Signature of Department Chairman"). Please ensure that there are sufficient funds.
- **Approvals** - The form must be approved and signed by the Director of Procurement. Note: If using Grant Funds, approval and signature from OSRP will also be required before submitting it to Procurement.
- **Purchase** - Bring the approved Internal Requisition Form along with your Campbell ID to the Bazaar. Upon arriving at The Bazaar, let the cashier know you want to purchase gift cards and that you will need to speak with the manager on duty. Select your gift card(s) and purchase at the register using the Internal Requisition Form. Please note that all gift cards purchased this way must be rung up by a manager. Gift cards are not eligible for the standard 15% off departmental discount.
- **Invoice** – The Bazaar will submit an invoice at the end of the month directly to the Business Office to be paid. Funds will be drawn down at that time.
- **Record Keeping** – Campbell is required by the IRS to track gift card recipients. Please provide the Procurement Department with the name, email, and amount received for every card. Failure to provide this information will result in the staff/department being barred from gift card purchase.

Any questions about the availability of gift cards can be sent to sm091@bncollege.com. Please note that not all gift cards from vendors in specific denominations will be available. If you are anticipating a large order for a specific vendor, please notify the Bazaar in advance so that the preferred cards are available.

PETTY CASH

The use of a Petty Cash System is a simple way to manage small expenditures that require immediate cash payments. There are two ways of using the Petty Cash System:

- Reimbursement of expenditures paid directly for purchases made by employees;
- Maintaining a Petty Cash Fund.

1. Reimbursement of Expenditures Paid Directly to Employees

At times, there is an immediate need to obtain certain materials or equipment. An employee may purchase an item(s) up to \$250 in the aggregate using his/her personal funds and subsequently request a refund from the University. While this is an option, employees are encouraged to use normal purchasing processes using the purchase or blanket purchase order. Using Purchasing contacts and expertise typically result in getting the best value.

Obtaining Reimbursement. A Petty Cash Voucher. This is prepared for each employee that incurs a petty cash expense. This form also indicates the budget number to be charged. All receipts must be attached to this voucher and the nature of the expense should be listed if not stated in the invoice or receipt.

Upon review and approval of the campus Budget Officer, the Petty Cash Voucher is sent to University Accounting for processing.

2. Maintaining a Petty Cash Fund

Typically, a Petty Cash Fund is maintained in a lock box and managed by a custodian appointed the task of disbursing, controlling, and requesting reimbursement.

Starting and Maintaining a Petty Cash Fund

1. A department that has a need for a Petty Cash Fund will write a request to the Department Head requesting and justifying the reasons why a Petty Cash fund is required for their department. The Department Head will approve a dollar limit to be maintained which is typically \$250.
2. Upon approval, a check request is prepared and cashed by the Custodian. The cash is maintained in small denominations in a lock box. The lock box must be placed in a locked file cabinet or other secure location.
3. Employees requesting reimbursement from the petty cash fund will submit a receipt(s) to the Petty Cash Custodian who will review the receipt for reasonableness and indicate the nature of the expense on the receipt. The Custodian cashes the amount of the receipt and pays the employee. The Custodian retains the receipt in the lockbox.

Cash Advances. In instances when a cash advance is required, an employee will prepare a justification letter for the advance. Upon completion of the transaction, the employee will submit the actual receipt for the expenditure with any change from the amount advanced. The Custodian verifies whether the receipt and the change equal the amount of the advance.

All Cash Advances must be pre-approved by the Accounting Department.

Reimbursement. When the amount of cash remaining in the cash box reaches a minimum level, the Custodian gathers the receipts and prepares:

- **A Petty Cash Reconciliation Reimbursement Form.** This provides a detailed list of all currency totals as well as the total amount of receipts to be reimbursed. This form is prepared by the Custodian and

approved by the Budget Officer. The amount of the remaining cash plus the total of the receipts should always equal the total of the fund set up for the petty cash fund;

- **A Petty Cash Voucher.** This is prepared for each employee that incurs a petty cash expense. This form also indicates the budget number to be charged. The receipt(s) must be attached to the matching voucher and include the nature of the expense incurred.
- Upon review and approval of the campus Budget Officer, the receipts and these two forms are forwarded to University Accounting for processing.

ASSET DISPOSAL

University assets include property procured for \$7,000 or more that may be used repeatedly without any material impairment of physical condition and which has a probable life expectancy of one or more years, including machinery, vehicles, software, and portable equipment. Assets for this purpose do not include building fixtures such as heating, ventilating, plumbing, and electrical equipment. Note: Technology including computers, tablets, monitors, telephones, printers, copiers, and cellular devices procured for more than \$500 will also be subject to the asset disposal procedure.

Procedure

- The departments should notify the Director of Procurement of assets that need to be disposed. Procurement will consolidate the items to be disposed.
- For Equipment purchased with Sponsored Research or Program Grant Funds, seek permission from the Director of Sponsored Research and Programs Officer before initiating disposal.
- **In all circumstances, users are required to completely erase data from all technology devices with any form of data storage capability to ensure no University data remains.**
- After approval from the Procurement Department, the Facilities Department will collect the assets.
- The list of assets will be forwarded to various department heads to determine if there is any need for any of the items on the disposal list. If so, arrangements are made by Procurement to transfer these to the requesting location.
- Remaining items will be sold, auctioned, recycled, or disposed otherwise.
- Fees generated from the asset disposal will be added to the general fund.

EXCEPTION: Property acquired through the federal or state educational agencies must be retained for at least four years before it can be sold, traded-in or cannibalized.

GRANTS

Procurement using grant funding may be subject to additional rules, regulations, and/or procedures. Please reach out to Campbell's Office of Sponsored Research and Programs (OSRP) at <https://www.campbell.edu/about/leadership/provost/sponsored-research-programs/about/> for more information on specific transactions.

AMAZON BUSINESS PRIME

The Procurement Department has made the decision to add Amazon Business Prime is an additional procurement tool for faculty and staff to purchase non-contracted items. This program simplifies the purchasing process and allows the University to take advantage of Amazon's wide product selection and competitive prices. It also allows for quick turn-around on items that need to be procured quickly.

Purchasing on Amazon Business is as user friendly as consumer-use Amazon.com and includes additional benefits, including:

- Free 2-Day shipping on [Prime-eligible items](#)
- Business pricing, including quantity discounts on eligible items
- Business Prime annual membership fee is funded centrally by Procurement Department, so University departments do not have to pay for separate Prime memberships
- Ability to create shopping lists for frequently purchased items
- Access to additional products, available only to Business customers
- Business Analytics functionalities for each of the group administrators to gain better insights on their respective group's spend in Amazon
- Access to specialized Amazon Business customer support at 866-486-2360

Use of Amazon Business Prime

- University departments should still use Office Value as their primary source to fulfill their procurement needs. Amazon Business Prime should be used only if a department cannot find the same product(s) from Office Value.
- The Procurement Department will perform periodic audits within Amazon Business Prime and reserves the right to deny access to department(s) who misuse Amazon Business Prime (such as using Amazon Business Prime to purchase items for personal use). Department Heads are strongly encouraged to audit purchases made within Amazon Business Prime to ensure that they are in accordance with their respective departmental procurement guidelines and policies.

Get started with Amazon Business Prime

Each department must elect a central person (Requester) as the primary to administer Amazon purchases for the department. Depending on the size and complexity of the department, the Procurement Department may provide additional Requester accounts at its discretion. The Requester must then follow the procedure below:

Requesting an Amazon Business Account

All Amazon Business Prime purchases must be placed through Campbell University's centralized Amazon Business account. To request an account, please email the [Amazon Procurement Technician](#) with your request from your University email account. In the body of the message, please include your name, department, Campbell ID number, Campbell Email address to be registered. Your request will be processed within two business days. Once processed, you will receive an activation email directly from Amazon.com with the submit line, "**Welcome to**

Amazon Business". The activation period is time sensitive; please take activate your account in a timely manner.

Activating my Amazon Business Account

Activate your account by clicking "Accept the Invitation" from the email. The first time you access Amazon Business, you will be prompted to create an Amazon Business account. **You must use your Campbell University email address for your Amazon Business account.**

What if I have previously used my University email address to register for a verified Amazon account?

All previous, stand-alone, Amazon accounts must be migrated under the centralized Campbell account. Prior to joining the Campbell account, you will need to de-register your account.

If any of the following applies to you, please contact your assigned Procurement Technician BEFORE you take the following steps to de-register your account.

- You are on an account with multiple users
- You have workflow approvals established on your account
- You have a shared payment method established on your account
- Any other specific features or customizations enabled on your account

If none of the above applies to you, please follow the steps to de-register your account:

- Click the following link to [deregister your existing account](#) (it will not remove any information on the account, simply the Amazon Business account tag)

I already use my Campbell email address to make PERSONAL Amazon.com purchases.

If your University email address is already associated with an Amazon.com account, you will have the option to split off and transfer any purchase history to a separate account. You will be prompted to enter a new, personal email address (e.g. gmail.com or Hotmail.com).

I purchased a Prime Membership with my Credit Card. Can I receive a refund now that I have joined the University Business account?

Yes, navigate to Manage My Prime Membership > End Membership and follow the steps to cancel your Prime membership without having to reach out to Customer Service. The pro-rated refund will be automatically calculated and issued to you. Please note: Customer Service Agents will not be able to issue a pro-rated refund for you if you call to "cancel your Prime membership.

Ordering from Amazon Business Prime

The steps to order from Amazon Business Prime are:

1. **Search/Add to Cart**– Using the search bar on the [Amazon webpage](#), enter a keyword or product number to search your item. Select the item, indicate quantity of item to be purchased, and add item to Cart.

2. **Check out Cart** – After all items have been added to cart and you are ready to check out.



Click on the cart icon at the upper right corner of the webpage. Ensure that you desired items are in cart with the right quantity and price. Click

Proceed to checkout

to check out. You will be taken to the “Business Order Information” screen. At this screen, please include all relevant information. Details on each section is available below:

- **PO Number** – the Procurement Department will input this for you.
 - **GL Code** – please input the budget code to charge this purchase.
 - **Location** – (Main Campus, CUSOM, Law School, etc.)
 - **Department** – department name
 - **Notes** – any notes to include
 - **Any special message to approver/processor.** If you are splitting this purchase between multiple budget codes, please specify how much will be charged to each budget code.
3. **Select a Shipping Address** – If your shipping address does not automatically populate, please input a new shipping address and select “Continue”
 4. **Select a Payment Method** – Select “**Pay By Invoice**” and click “Continue”
 5. **Review Your Order** – Be sure to review your order for completion. Select “Submit Order for Approval” when ready.
 6. **Purchase Requisition** - Requesting department will still need to prepare a purchase requisition using the [Purchase Requisition Form](#) when utilizing Grant Funds. This form will provide OSRP with the necessary approvals to process your order. When the form is complete, please email the Purchase Requisition Form through the usual channels associated with the budget code.