P-Card Information

How do I pick up my P-Card?

The P-Card department will email the Accountholder when the card is available for pickup. The Accountholder (or designee with cardholder approval) may pick up the card during our office hours which are weekdays between 8:00 am – 12:00 pm at 104 Airport Drive, Suite 3500.

How do I check my available credit?

Please log into WORKS®. In the Accounts Dashboard on the home page, select the Account ID for your card and then "View Auth Log." Your available credit will be listed next to "Available Funds."

How do I request a replacement card?

If your card is approaching its expiration date, a renewal card will automatically be sent to the P-Card Office. If your card has become damaged, please contact Bank of America at 888-449-2273 to request a replacement card. If your card has been lost or stolen, please contact Bank of America Fraud at 866-500-8262 to report the card. The Fraud Department will review recent activity on your card to ensure no fraudulent transactions have occurred. They will close your existing account number and issue a new card. In any of these scenarios, the P-Card Office will notify you when the card is available for pickup.

I recently changed my name. How do I receive a new card with my updated name on it?

Please complete a P-Card Account Maintenance Form and email to pcard@unc.edu.

I am transferring to another department within the University. Can I take my card with me?

No, please submit a P-Card Account Maintenance Form to request that your card be cancelled. If you have a business need to obtain a P-Card for your new position, please complete a P-Card Application. You will not need to re-take the P-Card Training and Quiz to obtain your card.

How do I request to close an account?

Please submit the account maintenance form to pcard@unc.edu. The card can be destroyed as we do not need it back.

Payments On P-Card

Can I use the P-Card to make payments via Venmo/PayPal?

Payments via Venmo are not allowed on P-Card. Payments via PayPal may be allowable but only when utilizing the guest option. Payment should never be made through your personal PayPal account and P-Cards should never be stored on your PayPal profile.

Can I use the P-Card to pay human study subject compensation?

No, payments for study subjects (including gift cards) are not allowed on the P-Card. For more information on how to remit payment to Study Subjects, please visit the Office of Sponsored Programs website.

How do I request a temporary credit limit increase on my P-Card?

Please work with your department to complete a P-Card Account Maintenance Form requesting the Single Transaction Increase and email to pcard@unc.edu.

Where can I find a copy of the University's tax-exempt letter?

The University's Tax-Exempt Letter is available on the University's policy website.

Can I make purchases on my P-Card in a foreign currency?

Yes, the bank will process the payment and automatically convert it to USD. A separate International Transaction fee of 1% of the total USD cost will be assessed and show as an additional transaction in WORKS®. From time to time, foreign currency transactions may be declined by Bank of America and/or Visa themselves. If your purchase is declined, please contact Bank of America Fraud at 866-500-8262 to authorize the purchase.

Can I purchase from eBay?

eBay purchases are permissible but are not recommended since the origin and validity of the items cannot be confirmed. If the items can be obtained through a different vendor, the University recommends completing that purchase through a different vendor other than eBay. If the item is only available via eBay, the Accountholder should provide an explanation of this when reconciling the transaction in WORKS®.

What do I do if I see a duplicate charge on my account?

The Accountholder must contact the vendor to request a refund of the duplicate charge.

How can I complete a purchase when my card has been declined due to a 3D-Secure related block?

The Accountholder should contact the Bank of America Fraud Department at 866-500-8262 for assistance.

Can I purchase gift cards or gift certificates on my P-Card?

Gift Cards or Gift Certificates constitute "cash equivalents" under IRS regulations and thusly are not permissible to be purchased on a P-Card. Gift Cards may be purchased through alternative purchasing methods available from the Cash Management Office or the Office of Sponsored Projects, as appropriate.

Can the P-Card be used at vendors who are listed in BuyCarolina?

BuyCarolina is the preferred method of purchase when doing business with these vendors. However, there may be occasions when due to timing or inventory availability, a P-Card purchase may be necessary.

Can the P-Card be used to pay for Student travel?

Yes, the P-Card may be used to pay for Student Conference Registrations, Lodging, and/or Ground Transportation. Please complete the P-Card Student Travel Pre-Approval Request Form and email to pcard@unc.edu. Airfare for students may be purchased via CABS; expenses are direct billed to the Department.

Can the P-Card be used to pay for guest travel expenses?

Yes, the P-Card may be used to pay for guest lodging and/or ground transportation. Please complete the P-Card Guest Travel Pre-Approval Request Form and email to pcard@unc.edu.

Can I use my P-Card to purchase gifts for employees?

Only if the purchase complies with Policy 1123 on Taxation of Employees' Gifts, Prizes and Awards. Gift Cards and Gift Certificates are never permissible on the P-Card.

What is the alcohol policy on a P-Card?

Per policy 1252.2, alcohol is not an allowable expense on the P-Card. For alcohol to be included, the transactions either need to be paid on a T&E Card by someone in attendance at the meal or paid on a personal credit card and submitted for reimbursement. A P-Card may only be used for meals if there is no alcohol included.

How long do I have to dispute a charge (from the date of the transaction posting)?

You have 60 days to dispute a charge.

How do I repay the University for an accidental misuse/abuse on my P-Card?

Write a check made payable to The University of North Carolina at Chapel Hill. Provide check to departmental accountant or finance team for processing. Upload a copy of the Deposit Transmittal Report (DTR) with the transaction in WORKS®. Upload the P-Card Misuse and Abuse Form and email form to pcard@unc.edu.

Can an Accountholder use their P-Card to pay for an Independent Contractor's hotel room?

No. The Independent Contractor (IC) should already be setup as a vendor with Accounts Payable, it would be better for them to pay out-of-pocket and submit for reimbursement.

WORKS®

How do I unlock my WORKS® account?

To unlock your account, send email to pcard@unc.edu.

Can an Accountholder or Proxy upload/remove a receipt on a transactions that has been signed off on in WORKS®?

If the transaction has not yet been approved by the Group Approver, changes may be made to the attached documentation. Once a transaction has been fully approved, the Accountholder/Proxy would need to contact the P-Card Office for assistance.

How do I reconcile a fraudulent transaction in WORKS®?

The Accountholder/Proxy should upload a note/memo in WORKS® as a receipt to confirm it is a fraudulent transaction and sign off. Any documentation provided to the Accountholder by Bank of America may also be included. The approver should ensure the transaction is reconciled to a valid chartfield string (CFS). When the fraud credit posts to the replacement P-Card, the transaction in WORKS® should be reconciled to the same CFS.

Why can I see my P-Card transaction as it looks like it has been signed off on but it's not being reflected in Infoporte?

Transactions are loaded in Infoporte the next business day after they have been fully approved in WORKS®. If the transaction has been paid against a different CFS than what is listed in WORKS®, the transaction was updated when it passed through CBM. If the transaction fails budget check in CBM, the transaction will be charged to the Department Default. If the transaction has not yet been loaded in Infoporte, it may be awaiting an update in CBM. This can occur when the Department Default fails budget check. The P-Card Office will contact the department for an alternate CFS.

What user roles can view the authorization log for a P-Card in WORKS®?

Only the Accountholder and the Proxy Reconciler can view the authorization log. The approver is in a higher hierarchy level and unable to view it.

How can a P-Card transaction be flagged so that the Accountholder or Proxy can make updates?

If an Accountholder or Proxy needs to update a transaction which has already been signed off on, they may ask the Group Approver to flag the transaction back so they can correct it. The Accountholder or Proxy will be able to remove the flag after making the correction.

Can we add someone as an authorized user to another employee's P-Card?

No, the University does not allow for the setup of Authorized Users.

How long do departments need to maintain P-Card documentation/receipts?

In accordance with the 2021 UNC System Retention and Disposition Schedule, WORKS® is the system of record for card activity and documentation for audit purposes. Documentation may be destroyed in office once it has been uploaded to WORKS®.