



# WILLIAM PATERSON UNIVERSITY

OFFICE OF THE ASSOCIATE VICE PRESIDENT FOR FINANCE AND CONTROLLER  
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## **Gift Cards Purchase and Oversight University Standard Operating Procedure (SOP)**

The purchase of gift cards is an allowable University expenditure provided that the following procedures are performed and that the cards are used for a viable University business expense such as sponsored program participation awards, human subjects involved in research conducted by the University, prizes and other awards. This SOP applies to all University funds, including sponsored programs funds.

### **Gift Card Inventory Registry**

The supporting documentation for gift card purchases must include an inventory registry which shows the identification number of each card, name of recipient, date that the card was given to the recipient, and reason for giving the card to the recipient. If the recipient names cannot be listed, the explanation for omission must be made on the list or attached thereto, however in certain cases recipient names are mandatory and may not be omitted.

Recipient names are mandatory in these cases:

- Where the recipient is an employee of WPUNJ, or
- Where the recipient will receive \$600 or more of accumulated card value during any calendar year

The inventory registry must be delivered to the Controller's Office no later than 60 days after the purchase date of the cards. It is expected that all cards will be transacted within this timeframe. Cards should be purchased in batch sizes that will be used within the 60-day period to ensure that excess quantity is not purchased.

For cards that are un-used after the 60-day period, the inventory registry should include a written explanation of how and when the cards will be used.

For cards that are un-used after the intended purpose/project has completed, a written explanation of how the un-used cards will be used is required.

Cards must be stored in a secure location and handled with the same caution and control as if they were cash.

### **How to Purchase Gift Cards**

Gift card purchases must be initiated by completing a requisition in Banner. The University Purchasing Department will fulfill the request using a preferred vendor. If specific gift card attributes are required that cannot be fulfilled by the preferred vendor, Purchasing will advise how to proceed.

Gift card purchases are not allowed on p-cards (see WPUNJ Procurement Card Program Policy and Procedures) or by employee reimbursement for out-of-pocket purchase unless pre-authorized by the Purchasing Department. Pre-

authorization will be granted in cases where the preferred vendor cannot fulfill some requirement of the order. An email or other written documentation of this determination from Purchasing is required as part of supporting documentation for gift card purchases that are not made via the Purchasing Department.

### **Required Supporting Documentation**

For gift card purchases made via Purchasing Department:

- At time of purchase – normal requisition-to-payment documentation
- At 60 days – completed inventory registry

For gift card purchases made via alternate method as pre-authorized by Purchasing Department:

- Written (email or other) authorization by Purchasing Department as to best method to make purchase and why the preferred vendor is not a viable option
- Invoice and/or other documentation to support purchase
- At 60 days – completed inventory registry

### **For Additional Information**

For assistance with the purchase of gift cards, contact the WPUNJ Purchasing Department:

Stephen Sondey      [sondeys@wpunj.edu](mailto:sondeys@wpunj.edu)      973-720-2862

For assistance with required supporting documentation, including the gift card inventory registry:

Glenda Jara      [jarag1@wpunj.edu](mailto:jarag1@wpunj.edu)      973-720-2845

Patrice Stewart      [stewartp@wpunj.edu](mailto:stewartp@wpunj.edu)      973-720-2868