

## NIH Purchase Card Supplement, Addendum 5.1 (July 2011)

Effective immediately, the following two sections, Section VII D and Section III F, in the NIH Purchase Card Supplement Version 5.0 (dated December 2010) are revised to align the NIH Purchase Card Supplement Version 5.0 (December 2010) with revised OCIO and CIT policy changes on electronic/mobile devices. This addendum will be available on the NIH Purchase Card website under <http://oamp.od.nih.gov/Division/SAPS/Acq/PCard/PCard.asp#PCG>.

The specific sections that have been revised are below:

### Page 17 -

### Section VII, Specialized Procedures, Paragraph D is revised to read as follows:

#### D. Mobile Device Purchases, Related Peripherals, and Applications (Apps)

Mobile devices (also known as Personal Digital Assistants or PDAs) include items such as cell phones, BlackBerrys, iPhones, iPads, iPods, and e-Readers. These devices, related peripherals and applications (apps) must be purchased and managed in accordance with the following:

1. *NIH Mobile Device Policy* at [http://ocio.nih.gov/nihsecurity/NIH\\_Mobile\\_Device\\_Security\\_Policy.doc](http://ocio.nih.gov/nihsecurity/NIH_Mobile_Device_Security_Policy.doc);
2. *NIH Technology General Rules of Behavior* at <http://ocio.nih.gov/security/nihitrob.html> - users electronically agree to this annually as part of the Security Awareness training.
3. *NIH Manual Chapter 2806 – “Limited Authorized Use of NIH IT Resources”* at <http://oma.od.nih.gov/manualchapters/management/2806/>,
4. *NIH Policy Manual 26101-26-6 – Cellular Telephone Services and Equipment* at <http://oma.od.nih.gov/manualchapters/acquisitions/26101-26-6/>; and
5. Additional IC-specific procedures and approvals for IT equipment must be followed and obtained. Please check with your IC’s IT department for specific policies.

If the purchase card is used to procure these items, the following is also required:

- Purchases must be pre-approved in writing and have a valid programmatic need justification
- Cardholders must obtain IT approval in accordance with their IC procedures before the purchase.
- Devices purchased must be entered into the property system correctly and must be decaled. (See NIH Supplement Version 5, Section V, Paragraph C, for additional instructions)
- For devices that require purchasing (authorized) related services and apps directly through the device, cardholders must immediately remove government account information (i.e., purchase card number, expiration date, etc.) from the device after each purchase is made.

**NOTE:** Purchasing subscriptions (i.e., magazines, newspapers, etc.) for the mobile devices is currently unauthorized (see the NIH Purchase Card Supplement Version 5, Section II, Paragraph B “Unauthorized Use of the Purchase Card”).

### Mobile Device Service Plans

Monthly service plans for mobile devices can be paid using the purchase card provided the annual cost does not exceed the cardholder’s single purchase limit. A complete invoice must be included as part of the purchasing documentation with the signed approval or an email indicating approval from the IC Cell Phone Manager. The IC Cell Phone Manager must review the monthly billing; determine which calls are for official business and request reimbursement for any personal calls from the authorized user, when necessary.

**Section III, Key Responsibilities, Paragraph F is revised to read as follows:**

**F. Cardholder**

The cardholder is responsible for maintaining their purchase card file which is to include, but not limited to:

- A printed copy of the NBS NIH Purchase Card Report (recently changed from a copy of the actual log) by date of matched transactions, per the NBS P-Card Reconciliation Process Cycle
- Documentation of pre-approval for purchase(s) and any necessary IT approvals
- Purchase requests
- Convenience check records, if applicable
- Charge, credit, and register receipts and/or slips
- Packing slips and/or other proof of receipt documents
- If applicable, a copy of the "SmartPay 2 Dispute Form"
- Awards and notices, if applicable
- Required clearances
- For monthly mobile device service plans, the complete monthly invoice signed by the IC Cell Phone Manager
- Justifications for personal need items (formally "personal appeal") (see Section VII. Specialized Procedures)
- A copy of all forms required by IC procedures
- Documentation of regulatory compliance for all purchases
- A printed copy of the NBS P-Card Statement of Account (Approved Invoice), signed by both cardholder and CAO.

If you have any questions about the revised policy, please contact the Purchase Card Help Desk via email [CreditCard@od.nih.gov](mailto:CreditCard@od.nih.gov) or at (301) 435-6606.