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Space Administration

NASA Shared Services Center

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NASA Shared Services Center Service Delivery Guide

NSSDG-5100-0001 Revision: 7.0

Effective Date: July 10, 2022

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Purchase Card Program

Responsible Office: Procurement Division

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Responsible Office: Procurement Division	Page 2 of 21
SUBJECT: Purchase Card Program	

Approved by

NSSC, Procurement Officer

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 3 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

DOCUMENT HISTORY LOG

Status	Document Version	Effective Date	Description of Change
Basic		02/09/2006	Basic Release
Revision	A	05/05/2006	Updated to reflect change in NASA on-line training site & update the workflow attached.
Revision	B	01/17/2007	Updated as a result of comprehensive review to validate activity. Information added to expand Agency Lead role for NSSC, replace website information, other editing changes and remove NSSC specific flowchart from the Appendix since that is only applicable to the NSSC versus the Agency role.
Revision	4.0	05/18/2012	Document originated under NSSC- PR-SDG-0003. Renumbered on 04/18/12 to NSSDG-5100-0001 to align with SDNS numbering system adopted in March 2010. Updated to reflect transition to new bank contractor, change steps to reflect agency Purchase Card Process Flow and incorporated into Appendix A.
Revision	5.0	09/13/2016	Updated to change the Center Coordinator designator from CAPC to CPC, increased the micro purchase limit, included the new records retention requirement, and added the new P-Card Erroneous Use Reimbursement Process. Also added language that addresses transition of the LaRC and KSC Purchase Card Programs to the NSSC as well as indicates the NSSC can manage and support other Center P-Card Programs.

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 4 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

Revision	6.0	07/09/2019	Reflects transition to NSSC; Incorporated new Escalation Process; Changed Center Coordinator (CPC) to P-Card SP & CS Team; Changed JPMorgan Bank to US Bank; Updated entire document to align with SAT SDG.
Revision	7.0	07/10/2022	<ol style="list-style-type: none"> 1. Sections 1 & 3.1: Updated to align with the PCPI 2. Section 2: Removed “procurement” and changed to “purchase card”. Also removed “onsite” work as being required. 3. Section 3.2: Added an introduction sentence 4. P-Card Process: Accounts for current requirements (such as correct training courses to include 889 training & requirement for SP to conduct 5% monthly transaction audits on P-Cards and Convenience Checks) 5. Metrics: Updated to account for current processes (ex: SNOW responses) 6. System Components: Added Federal Acquisition Institute Cornerstone OnDemand (FAI CSOD) 7. Customer Contact Center Strategy: Added language about the “Contact Us” Feature on the P-Card webpage. 8. Appendix A: Added “CH”, “AO”, “OP”, “P-Card”, “SNOW”, “HQ”, “OCFO”, “QAD”, “OIG”, “FAI CSOD”, “ASP” and “OSBP” and updated throughout 9. Appendix B: Updated as needed 10. Changed “P-Card Web Solution System” to “P-Card Application” 11. Changed “AAO” to “APS” 12. Changed “NASA Enterprise Performance System (EPSS)” to “APS Help Center” 13. Removed references to “Intellilink”

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 5 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

TABLE OF CONTENTS

1.0 Introduction	6
2.0 Purpose	6
3.0 Applicability/Scope	6
3.1 NSSC Responsibilities	7
3.2 NASA Center Responsibilities	8
4.0 Privacy Data	8
5.0 Records	8
6.0 Purchase Card Process	9
6.1 NSSC Purchase Card Team	9
6.1.1 NSSC Purchase Card SP Team	9
6.1.2 NSSC Purchase Card CS Team [indicated in red]	9
PURCHASE CARD PROCESS	10
METRICS	13
SYSTEM COMPONENTS	14
CUSTOMER CONTACT CENTER STRATEGY	15
APPENDIX A	16
APPENDIX B	17

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 6 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

1.0 Introduction

The NASA Shared Services Center (NSSC) supports the NASA Purchase Card Program. The Agency Purchase Card Coordinator (APC) serves as the Agency-wide lead, focal point and subject matter expert for the oversight and management of the Agency Purchase Program, in accordance with the Office of Management (OMB) Circular A-123, Appendix B, and other regulatory requirements.

2.0 Purpose

The purpose of this document is to delineate the responsibilities of purchase card personnel at the NSSC. The services described in this guide are performed by Civil Service (CS) and Service Provider (SP) personnel with a duty station of the NSSC.

3.0 Applicability/Scope

This guide outlines the following areas of responsibility for NSSC personnel:

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 7 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

3.1 NSSC Responsibilities

The NSSC assumes all responsibility for the management and oversight of the Agency Purchase Card (P-Card) Program which include, but are not limited to, the following:

- Serving as the primary interface with the GSA Office of Charge Card Management and the contractor bank
- Providing operational support to cardholders (CHs) and approving officials (AOs)
- Conducting and documenting reviews of CH/AO activities
- Managing CH/AO accounts and authorization controls
- Ensuring that CHs/AOs are fully trained, and refresher requirements are met
- Issuing, suspending, or canceling cards
- Maintaining a central record of all purchase card delegations/accounts and their status: active, suspended, or closed
- Conducting semi-annual reviews of CH accounts to determine the necessity of the number of accounts, account limits, and the level of control of individual AOs
- Responding to data calls and Agency reporting, to include monthly FPDS-NG P-Card data submitted to the NASA Office of Small Business Programs (OSBP)
- Provide subject matter expertise and input to the NASA HQ's Office of Procurement (OP) in support of the development and maintenance of Agency purchase card policy

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 8 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

3.2 NASA Center Responsibilities

The Center Responsibilities comprise those of the CH and AO which include, but are not limited to, the following:

- Requesting Accounts for Cardholders and Approving Officials
- Abiding by all rules and regulations, which include, but are not limited to the Federal Acquisition Regulations (FAR), NASA FAR Supplement and the Purchase Card Procedures and Instructions (PCPI)
- In instances of card abuse, misuse or fraud, take disciplinary action, if needed
- Safeguarding the purchase cards
- Documenting each order log in the P-Card Application system prior to purchase
- Adhering to regulations surrounding prohibited transactions and splitting orders
- Documenting proper Special Approvals prior to purchase
- Complying with the Reconciliation and Dispute process
- Collecting and destroying the P-Card from employees who are out-processing the Center and notify the NSSC accordingly

4.0 Privacy Data

All participants involved must ensure protection of all data covered by the Privacy Act and other applicable Federal regulations and NASA policies.

5.0 Records

The Purchase Card Program involves the creation and receipt of NASA official records as defined by NPR 1441.1. All Purchase Card Program records will be maintained electronically in accordance with NASA Records Retention Schedules, and FAR 4.805(b). These records are included in the Procurement functional Master Records Index (MRI), applicable NASA Records Retention Schedule (NRRS) or General Records Schedule (GRS) which specify record retention/disposition authority.

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 9 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

6.0 Purchase Card Process

The following table is a representation of how the NSSC P-Card Team internally processes the Purchase Card Program.

6.1 NSSC Purchase Card Team

The NSSC Purchase Card Team will execute the above-mentioned NSSC Responsibilities. The NSSC Purchase Card Team consists of both SP and CS Procurement personnel who work together to ensure the center's request is fulfilled in a timely manner while adhering to all required regulations.

6.1.1 NSSC Purchase Card SP Team

Service Provider employees are tasked with executing the non-inherently governmental NSSC responsibilities when processing purchase card activities. As most of the responsibilities are non-inherently governmental, the NSSC Purchase Card Team consist mostly of Service Provider employees.

6.1.2 NSSC Purchase Card CS Team [indicated in red]

Civil Servant employees are tasked with executing inherently governmental responsibilities such as providing guidance as needed and can be requested to assist the NSSC Purchase Card SP Team in resolving issues with non-inherently governmental responsibilities.

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 10 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

PURCHASE CARD PROCESS

Stage	Roles and Responsibilities	Tips/Notes
<u>Stage 1A</u> Obtain purchase card	The NSSC P-Card SP Team receives the Purchase Card Request form for the nominated CH then Initiates a NAMS Request for access to P-Card Application.	The AO shall initiate the request for purchase card based on needs of the organization
<u>Stage 1B</u> Complete required training	The NSSC P-Card SP Team ensures nominated CH/AO completes the required two mandatory P-Card SATERN training courses: P-Card for Cardholders, Delegates and Approving Officials (2020) and NASA Purchase Card Program. Also, required is the Government-wide training course "Section 889 Prohibition of Certain Telecommunication and Video Surveillance Services or Equipment" via FAI CSOD; receives completion certificates.	
<u>Stage 2A</u> Issues purchase card	The NSSC P-Card SP Team creates CH file; prepares Letter of Delegation for Procurement Officer's signature; requests card account within Access® Online (the bank's electronic access system).	
<u>Stage 2B</u> Set-up profiles/roles in system	The NSSC P-Card SP Team sets up CH and AO employee profiles and roles in the P-Card Application; enters card account data.	
<u>Stage 2C</u> Provides letter of delegation to cardholder	The NSSC P-Card SP Team provides signed Letter of Delegation & training statement to new CH and maintains a copy of each in the CH's official record; Center specific policies, and Application and Platform Services' (APS) tips/tricks for creating order logs and reconciling, as well as provides links to the PCPI, and the for job aids.	The CH receives the actual card at their work address from the bank contractor

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 11 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

Stage	Roles and Responsibilities	Tips/Notes
<u>Stage 3A</u> Verifies use of purchase card by running specified monthly reports	The NSSC P-Card SP Team verifies the following: 1) purchases are not a prohibited or restricted item and is an authorized purchase; 2) purchases are within single purchase limits; 3) CH obtains any special approvals; 4) CH checks required sources; and 5) CH considers special requirements for delivery, proper equipment tagging, receipt inspection and calibration.	The APS has step-by-step procedures posted on the bReady Enterprise Portal under APS Help Center Job Aids.
<u>Stage 3B</u> Create order log & place order	By running monthly reports, the NSSC P-Card SP Team verifies the CH creates the order log in P-Card Application PRIOR to placing the order with the vendor.	CH to follow User procedure: "Create Record of Purchase" on the bReady Enterprise Portal's APS Help Center
<u>Stage 3C</u> Receive & Inspect items ordered	The NSSC P-Card SP Team confirms the CH performs receiving inspection activities following the relevant procedures.	The P-Card Application has a procedure for accepting deliverables. Deliverables may be received by desktop receiving, or via central receiving.
<u>Stage 4A</u> Importing monthly transactions for reconciliation	The APS retrieves card transactions from the bank contractor on a monthly basis beginning on the 11 th and uploads them to P-Card Application.	
<u>Stage 4B</u> Reconcile transactions	The NSSC P-Card SP Team works with CHs to ensure reconciliation of the transactions against the order log information is correctly implemented within the 5-day timeframe.	
<u>Stage 5</u> Approve monthly transactions	In instances where the AO is unable to provide approval in P-Card Application, the NSSC P-Card CS Team provides approval on their behalf; AO acknowledgement is required upon their return to the office.	

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 12 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

Stage	Roles and Responsibilities	Tips/Notes
<u>Stage 6</u> Extract reconciled transactions and conduct validation	<p>The NSSC P-Card SP Team extracts transactions monthly in SAP (NASA's Financial Management System); executes WAT-Web tool validation reports, performs validation process; creates Service Requests for discrepancies and sends to the APS for corrections; completes the validation spreadsheet; and submits the Validation sheet to NSSC Accounts Payable (A/P) for payment processing.</p>	<p>The APS has step-by-step procedures posted on the bReady Enterprise Portal under APS Help Center</p>
<u>Stage 7</u> Audit P-Card transactions	<p>In accordance with NSPWI-5100-0007, NASA Purchase Card Internal Review Guide, the SP Team runs the required reports from P-Card Application and Access Online.</p> <p>The SP is also responsible for conducting 5% of monthly audits for P-Cards and Convenience checks.</p> <p>The NSSC P-Card CS Team verifies information for all required audits.</p>	
<u>Stage 8</u> Turn in purchase card	<p>Upon receiving a notification of a resigning, transferring or retiring CH, the NSSC P-Card SP Team will process a closeout for the account with the APC's signature.</p> <p>The NSSC P-Card SP will close the account with the bank once all transactions have been posted and paid.</p>	

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 13 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

METRICS

Initiating Office/Entity	Deliverable (Output)	Receiving Office/Entity	Metric
NSSC Procurement Division	Procurement Services Reports	Customers requesting supplies or services via the purchase card or those that have questions/concerns regarding the P-Card Program can submit feedback. Customers can also request a call back from the APC.	Customer satisfaction feedback via Service Now (SNOW) tickets. SP responds to Negative Survey responses via SNOW. APC responds to Customer Requested Callbacks via SNOW.
NSSC Procurement Division	Reports	Headquarters (HQ) Office of the Chief Financial Officer (OCFO) Delinquency Report and OMB Reporting	Timely submission of reports by the due date
NSSC Procurement Division	Audit Responses	HQ OCFO, Quality Assurance Division (QAD), HQ Office of the Inspector General (OIG), OMB, and the Government Accountability Office (GAO)	Respond to audit requests by deadline dates
NSSC Procurement Division	Monthly Reconciliation	NSSC Accounts Payable	Provide validation spreadsheet and request for payment processing in accordance with the Prompt Payment Act

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 14 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

SYSTEM COMPONENTS (EXISTING SYSTEMS)

IT System Title	IT System Description	Access Requirements
SAP-Core Financial	Accounting system of record	Supervisor approval of access via NAMS application
P-Card Application	The official system of record for purchase card procurements. On-line system that allows for creation of order logs, tracks P-Card transactions, ensures funds are available before ordering. Also, the system used for reconciling monthly statements	NSSC P-Card SP or CS Teams are able to approve or deny NAMS Application Requests
Service Now (SNOW)	Work Management System	N/A
SATERN	System for Administration, Training, and Educational Resources for NASA	N/A
Federal Acquisition Institute Cornerstone OnDemand (FAI CSOD)	CHs / AOs are required to register in FAI CSOD to take Section 889 training.	N/A
Access® Online	US Bank's electronic access system used to request, manage, and close P-Card accounts	NSSC P-Card SP or CS Teams are able to approve or deny access request

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 15 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

CUSTOMER CONTACT CENTER STRATEGY

General contact with the NSSC regarding Purchase Card purchases should be made to the NSSC Customer Contact Center (CCC). The CCC is a disciplined approach to the management of customer interactions for timely resolution of customer issues, timely follow-up, and feedback on outstanding issues. The CCC handles phone calls, e-mails, and online communications. The staff is trained in all aspects of shared services to be able to respond to customer inquiries of a general nature. The CCC is structured around teams that have ongoing access to a knowledge management tool and to a knowledge manager for assistance with customer inquiries. It is expected that routine calls and requests for routine information will be handled by the CCC. The CCC has procedures in place to handle non-routine calls or requests that may require immediate elevation to a Purchase Card team member (via ServiceNow case management as appropriate) to the NSSC Purchase Card Team.

The CCC can be reached via phone, fax, or email. Each call, fax or email will initially be assigned as a “Level 1” (L1) case. The CCC will make every effort to answer the inquiry, and a ServiceNow case management request will be opened for all inquiries. In the event a question cannot be answered by the CCC, the case will be routed to “Level 2” (L2) which is the SP Purchase Card team. Inquiries that are complex in nature and require interpretations of laws or regulations will be routed to “Level 3” (L3) which is the CS Purchase Card Team.

E-mail: nssc-contactcenter@nasa.gov

Fax: 1-866-779-6772

Phone: 1-877-NSSC123 (or 1-877-677-2123)

Hours: 8am - 8pm Eastern Standard Time, Monday through Friday

The CCC will have a list of the appropriate POCs at the NSSC for elevation purposes, as well as the reference Purchase Card Web pages and other pertinent information.

Customers also have access to self-service Purchase Card information located on Purchase Card website, to include using the “Contact Us” feature an alternative option to contacting the NSSC CCC.

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 16 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

APPENDIX A –
ACRONYM LIST

Acronym	Definition
AO	Approving Official
AP or A/P	Accounts Payable
APS	Application and Platform Services
AR	Accounts Receivable
APC	Agency Program Coordinator
CH	Cardholder
CS	Civil Servant
EAS	Electronic Access System
FAI CSOD	Federal Acquisition Institute Cornerstone OnDemand
FAR	Federal Acquisition Regulation
GAO	General Accountability Office
GRS	General Records Schedule
GSA	General Services Administration
HQ	Headquarters
IDR	Invoice Data Requirements
MRI	Master Records Index
NASA	National Aeronautics and Space Administration
NFS	NASA FAR Supplement
NPD	NASA Policy Directive
NPR	NASA Procedural Requirement
NRRS	NASA Records Retention Schedule
NSSC	NASA Shared Services Center
OCFO	Office of Chief Financial Officer
OIG	Office of the Inspector General
OMB	Office of Management and Budget
OP	Office of Procurement
OSBP	Office of Small Business Programs
P-Card	Purchase Card
PCPI	Purchase Card Procedures and Instructions
QAD	Quality Assurance Division
SDG	Service Delivery Guide
SNOW	Service Now
SP	Service Provider

NSSC Service Delivery Guide	NSSDG-5100-0001 Revision 7.0
	Number
	Effective Date: July 10, 2022
	Expiration Date: July 9, 2025
Page 17 of 21	
Responsible Office: Procurement Division	
SUBJECT: Purchase Card Program	

APPENDIX B – PURCHASE CARD PROCESS FLOW









