Making Purchases & Tax Exemption

Card Billing Address
- McKean House
- 807 Union Street
- Schenectady, NY 12308
- Billing Phone number 518-388-6973
- When needed, McKean House can be added as an additional address line.

Shipping Address
- Building Name
- Union college
- 807 Union Street
- Schenectady, NY 12308

Tax Exemption
- https://www.union.edu/finance/forms/tax-exemption

Inform vendor about tax exemption
- Tax Exemption # is on the card
- NYS (and most other states) still require the tax exemption form to be provided.

For additional Tax Exempt information, please select Tax Exemption on the Card Program Website.

Always Obtain Itemized Receipts:
- Scan or Save ITEMIZED receipts.
- Telephone purchases: ask vendor to fax and/or mail itemized sales receipt
- Online purchases: print out or save as PDF the confirmation page which needs to include the item purchased and amount paid.

Card Activation & Security

1. Call number Card Program office X6534 or X6973
2. Verify your PIN number when activating card.
3. Remove sticker and sign card

Cardholders are responsible for the security of their card and are accountable for all purchases made with the card.
- Do not provide card information to co-workers
- Keep the card in a secure location
- Online ordering-order from secure websites

Lost/Stolen & Damaged Cards

Lost or Stolen Cards
1. Immediately call Bank of America Customer Service (800-300-3084, 24 hours a day, 7 days a week)
2. You will be asked security questions including Union address and Verification code:
   - This code is 00 plus your entire 7 digits Union ID# which with the bank, replaces a nine digit SS # for your account.
3. Notify Card Program Administrator
4. A new card will be sent to the Program Administrator who will then forward it to you.
5. Once your card is activated, remember to update the new card number and expiration date with all necessary vendors.

Damaged (Replacement) Cards
1. Notify the Card Administrator
2. Your new card will be sent to you with the same account number.
3. Destroy your damaged card by cutting the magnetic strip and the card number.

Problem Resolution

Declined Transactions
- Contact Card Administrator or Bank of America (emergency)
- Check Authorization Log in Works to see the reason for decline.

Errors or Disputes (within 30 days of purchase)
1. Resolve with vendor first.
2. If credit is required, apply credit to the credit card account. Do not accept cash or check for refunds.
3. Ask for a receipt for the credit.
4. If dispute cannot be resolved:
   - Contact Program Administrator
   - You will be asked to complete a dispute form and supply all documentation
   - Process lasts between 30-60 days.
Uses Of The Card
The credit card issued to any Cardholder is the property of Union College and is only to be used for College related purchases. Abuse of your card or failure to follow procedures established for the Union College Card Program and agreed to on your signed credit card agreement may result in revocation of card privileges or other consequences, including employee disciplinary actions or termination. Transactions not settled with the Finance office within 30 days will put your credit card into suspend. Transactions will be declined until the finance office can close any outstanding transactions.

Unauthorized Transactions
- Personal Use of Card
- Cash Advances (blocked use)
- Union College Purchases- This includes the Bookstore, Athletics, Dining Services and College Relations– Please charge your account directly
- Computers, Laptop, & Software (order through ITS) or Major Furniture & Office Layouts (order through Department or Purchasing)
- Staff Relocation / Moving Expenses – use existing HR process
- Gasoline for Personal Vehicle- Submit a mileage reimbursement using the current mileage rate-mileage covers your gas, insurance and wear & tear – include a map to an from Union
- Capital purchases (tangible items) over $2000.
- Travel Insurance, Priority Seating and/or Advanced Boarding fees
- Gifts for employees
- Meals with co-workers at local restaurants
- Items delivered to home address
- Gift cards of any kind- including Groupon

Authorized Transactions
- Books, Magazines, Subscriptions
- Off Campus Catering and Business meals
- Coffee & Water Delivery
- Office Supplies
- Conference/Seminar Registration Fee
- Entertainment Tickets (consistent with College Policy)
- EZ Pass payments-College Owned Vehicles
- Gasoline-Rental or College Owned Vehicles
- Gifts, Flowers, and Promotional Products for non-Union recipients
- Laboratory Equipment and Supplies
- Classroom Equipment and Supplies
- Licenses & Permits
- Lodging (Hotel, Motel)
- Memberships and Dues
- Newspaper Advertisements
- Repair Services
- Stationery, Envelopes, Letterhead
- Transportation-Ground and Air