

GSA

SmartPay®

Supporting your mission

Helpful Hints for Purchase Account Use



The GSA SmartPay[®] Purchase Account

In accordance with the Federal Acquisition Regulation (FAR) 13.301, the government-wide commercial purchase account is authorized for use in making and/or paying for purchases of supplies, services, or construction.

As a purchase account holder for your agency/organization, you will be responsible for making payments and/or purchases on behalf of your agency/organization.

Having this account provides your agency/organization with numerous benefits. With these benefits come certain responsibilities for you. This booklet is intended as a quick reference for “Dos and Don’ts” to using your purchase account. It also provides helpful information about your account.

Account Holder Responsibilities: DO'S

You are the government's agent for each purchase made with the purchase account. You are responsible and accountable for each transaction. In addition to the responsibilities listed here, you must comply with all applicable regulations and procedures of your agency/organization.

DO keep your account safe and secure.

DO maintain a record of all purchase pre-approval and approval documents.

DO maintain a log of all your purchases.

DO keep your receipts for all purchases.

DO use the account only to make informed buys of approved goods and services.

DO ensure availability of funds before purchase.

DO observe all dollar limits on purchases.

DO seek tax exemption.

DO reconcile all transactions.

DO use the account ethically.

DO resolve disputes in a timely manner.

DO leverage buying options to save your agency money.

DO contact your Agency/Organization Program Coordinator (A/OPC) for proper guidance on destroying your card if you leave your agency/organization or retire.

DO immediately report your lost or stolen account to your A/OPC and the issuing bank.

DO destroy any lost or stolen cards that are recovered.

DO purchase supplies and services from mandatory sources such as AbilityOne (see FAR 8.7).

DO be aware of identity theft schemes attempting to gain access to financial information.

DO be aware that misuse of the purchase account could result in disciplinary actions by your agency.

Account Holder Responsibilities: DON'Ts

DON'T use the purchase account to purchase:

- Long-term rental or lease of land or buildings;
- Travel or travel-related expenses (except it may be used for meeting spaces, and local transportation services, e.g., Metro fare cards, subway tokens, etc.);
- Cash advances, unless permitted by agency/organization selected value-added option;
- Personal items; or
- Items that exceed the government's actual need (e.g., designer items when less expensive items are available).

DON'T allow others to use your account. It is assigned to you and is your responsibility.

DON'T split purchases in order to stay below your authorized spend limit. If you do so, your account privileges may be suspended and you could face further disciplinary action.

If you are uncertain as to whether a purchase is appropriate, ask your Approving Official (AO) or A/OPC. Your agency/organization may have additional restrictions for the use of the account, which you should follow.

Reconciling Your Purchase Account Statement

As one of your primary jobs as the account holder, you must review and reconcile your monthly billing statement within the timeframes required by your agency/organization (usually three to five days). Reconciling your statement includes certifying receipts, annotating accounting codes, identifying disputed items, and completing any other documentation required by your agency/organization before forwarding your statement to your AO or the appropriate payment/finance office.

If you dispute a transaction, be sure to contact the merchant and/or your agency/organization's bank promptly to ensure the dispute is recorded within the required timeframes outlined in the GSA SmartPay Master Contract.

Remember, the Government is liable for all undisputed charges made by an authorized account holder. Use your account wisely!

Reporting a Lost or Stolen Account

Immediately report your lost or stolen purchase account to your A/OPC and the issuing bank. The government is not liable for unauthorized use on lost or stolen accounts.

The bank will assign a new account number and mail a replacement card to you within 48 hours from the time the theft or loss was reported.

Resources

Online Training

Visit our training website at **<https://training.smartpay.gsa.gov>** for online GSA SmartPay Purchase Account Holder training to receive detailed training on the use of the purchase account.

When visiting the website, login or register if it is your first time. After logging in and completing the training module, take the online quiz. A passing score on the quiz will enable you to print a certificate of completion. You will receive 1 CLP training credit.

Resources

Bank Contacts

Account holders who have questions related to their specific account, must contact their agency's issuing bank directly:

Citibank: (800) 790-7206

USBank: (888) 994-6722

For additional information on the GSA SmartPay program, visit [**https://smartpay.gsa.gov**](https://smartpay.gsa.gov)

Contact Your Program Coordinator

Write the name, phone, and e-mail of your Agency/ Organization Program Coordinator (A/OPC) here:

Notes

How to reach us

For additional information,
visit our website:

<https://smartpay.gsa.gov>