



Applying for a University Departmental Pcard – Page 1

Applying for a Student Organization Pcard – Page 3

---

### Applying for a University Departmental Pcard

#### Eligible Individuals

Faculty and Staff must be Oklahoma State University full-time, permanent employees (.75 FTE and above). Student employees may be issued Pcards.

#### Required Forms

Forms can be found at <https://adminfinance.okstate.edu/procurement/pcard.html>. Once complete, email the completed documents to [osu.pcard@okstate.edu](mailto:osu.pcard@okstate.edu), or send the originals through campus mail to 1224 N Boomer Road.

#### **1. Application Form for Pcard or Works User Access**

- Must be signed by the cardholder, approver, accountant, and appropriate administrator.
- Department administration is to establish spending limits for each cardholder. Limits are to be specified on the Pcard Application and must be reasonable and in-line with the cardholder's duties and expected spend.
  - Employees: Monthly Cycle Limit shall not exceed \$50,000. Departments will be required to provide justification for any monthly credit limit over \$10,000. Single Transaction Limit shall not exceed \$5,000.
  - Student employees: Justification is required for a cycle limit over \$2,500 and a single transaction limit over \$500.

#### **2. Conflict of Interest Form**

- Documents any outside financial interest, which may affect purchasing decisions.

#### **3. Employee Agreement Form**

- Required for all cardholders.

## **Training**

- All cardholders and individuals in assigned roles must complete training.
- The training can be found on-line at <https://hr.okstate.edu/talent-development/p-card-training.html>
- Go through the training and then take the quiz.

## **Card Delivery**

Once the forms are processed by the Office of Central Procurement, Bank of America will send the card directly to the cardholder at the address listed on the Application Form within 7-10 business days.

---

## Applying for a Student Organization Pcard

### General Information

- Only the Treasurer, President, or Adviser may have a Pcard.
- Student spending limits may not exceed \$500 for each single transaction and \$2,500 for the monthly Pcard cycle.

### Training

- All cardholders, advisors and individuals in assigned roles must complete training before a card will be issued and access granted to Works.
- Training can be found online at <https://hr.okstate.edu/talent-development/p-card-training.html>
- Click on the link and follow the instructions to complete the training. There will be a PowerPoint presentation, followed by a 20-question quiz. You must answer 15 questions correctly to pass the quiz.

### Forms

- All student organization cardholders and their advisor must complete an application to obtain a card and/or have access to the credit card company's website (Works).
- All forms are located at <https://adminfinance.okstate.edu/procurement/pcard.html>.
- Applications must be signed by all parties including the Director of Campus Life.
- All cardholders must also complete and submit the "Conflict of Interest Form" and the "Employee Agreement Form."
- Once complete, email the completed documents to [osu.pcard@okstate.edu](mailto:osu.pcard@okstate.edu), or send the originals through campus mail to 1224 N Boomer Road.

### Card Delivery

Once the forms are processed by the Office of Central Procurement, Bank of America will send the card directly to the cardholder at the address listed on the Application Form within 7-10 business days.