

Pcard Application Checklist - Administrative/Departmental Card

- Application Signed by the Cardholder, Approver, Accountant and Department Head
- Conflict of Interest Form
- Employee Agreement (even for students)
- Default Fund Number Entered (Cannot have multiple default numbers)
- CWID Complete. Format: 9##### (Numbers only)
- Administrative Pcard Training Completed

Note: Second printed line of Pcard is limited to 21 characters.

Cardholder is Regular Employee

- Employee is at .75 or greater employment
- Employee is not temporary
- Single Transaction Limit is \$5,000 or less.
- Cycle Limit is \$10,000 or less. If higher, explain why. Note on application.

Cardholder is a Student Employee

- Single Transaction Limit cannot be more than \$500. If higher, explain why. Note on application.
- Cycle Limit is \$2,500 or less. If higher, explain why. Note on application.
- Students can't retain fulltime possession of the Pcard. Which fulltime employee will be responsible for keeping custody of the card and check it out to the student when needed? Note this on the application.

Note: List is not all-inclusive.

Pcard Application Checklist - Student Organization Pcard

- Application Signed by the Cardholder, Approver, Accountant **and Advisor**.
- Director of Campus Life, Jon Mark Day, has signed the Application (Mandatory)
- Default Fund Number Entered (Can't have multiple default numbers)
- CWID Complete. Format: 9##### (Numbers only) Example: 912345678
- Cardholder can only be the advisor, treasurer, or president.
- Conflict of Interest Form
- Employee Agreement (even for students)
- Student Organization Pcard Training Completed

Note: Second embossed line of Pcard is limited to 21 characters.

Cardholder is Regular Employee (Advisor)

- Advisor/Employee is at .75 or greater employment
- Advisor/Employee is not temporary
- Single Transaction Limit is \$5,000 or less.
- Cycle Limit is \$10,000 or less. If higher, explain why. Note on application.

Cardholder is Student President or Treasurer

- Single Transaction Limit cannot be more than \$500. If higher, explain why. Note on application.
- Cycle Limit is \$2,500 or less. If higher, explain why. Note on application.
- Students can't retain fulltime possession of the Pcard. Which fulltime employee will be responsible for keeping custody of the card and check it out to the student when needed? Note this on the application.

Advisor is NOT a Cardholder (The advisor needs to know what is going on with the org)

- In all cases, if the advisor IS NOT already in Works, we need a Pcard/Works User Access Application and Student Organization PCard training. The advisor needs to know how the Pcard program works and what is required.
- If the advisor is already in Works, the Pcard/Works User Access Application and Student Organization PCard training are not required; however, we HIGHLY recommend the advisor run through the training module because the rules are different for student orgs.

Note: List is not all-inclusive.