



APPLYING FOR A STUDENT ORGANIZATION PCARD

General Information

- **For Assistance**
 - Start with your organization's advisor. Your advisor's department should have a Pcard accountant, who has a working knowledge of the application process and is often your best resource. If your advisor does not know the identity of the Pcard accountant, feel free to contact the Pcard office for guidance.
- **Who can be a cardholder?**
 - President or Treasurer of the Organization. Only one student officer may obtain a card.
 - Only one advisor per student organization may have a card.
- **Other**
 - The cardholder's name and the current advisor's name must be on the organization's approved signature card. Contact Leadership and Campus Life for assistance.
 - Cards are issued in the person's legal name. No exceptions.
 - Only the cardholder may use the card or its number. Sharing may result in card revocation.

Common Terms

- **Accountant (aka Pcard Accountant)** – A full-time employee, often a full-time staff member in the advisor's department, who knows what purchases are permitted or prohibited. For a full description, see Pcard Guidelines.
- **Approver** – A full-time employee, often the advisor, who should know what the organization needs to purchase.
- **Bank of America** – The bank that issues our Pcards.
- **Fiscal Officer** – A full-time employee in a senior fiscal position within the college or division.
- **Pcard Guidelines** - A manual or guide available online that provides details about the Pcard program including a description of common processes and prohibited purchases.
- **Sign Off** – Mandatory action taken in the Works system by cardholders, approvers, and accountants.
- **Works** – The bank's internet-based program used to manage our credit card transactions.

Training

- The cardholder, advisor, and any individuals in assigned Works' roles must complete Pcard training before a card will be issued and access granted to Works.
- Training can be found online at <https://rise.articulate.com/share/qlxB-S3uNP-7uj2ldM0ChuX2pA1ISFrW>. Click on the link and follow the instructions to complete the training. The material will be followed by a 20-question quiz. You must answer 15 questions correctly to pass the quiz. To receive credit, you must attach the Certificate of Completion to your Pcard Application or email the certificate to the Pcard Office. If you miss this part, you will have to retake the quiz to generate a new certificate.

Required Forms

- Cardholder Only: All student organization cardholders must complete an application packet to receive a Pcard and be given access to Works. This includes the approved signature card.
- Works User Only: If the advisor is not a cardholder but still requires Works access, a Pcard/Works application and Pcard training must be completed. The other forms are not required.
- Advisor – No card and no Works Access: If the advisor does not need access to Works, Pcard training must still be completed.
- Submit: Once packets or materials are complete, email the documents to osu.pcard@okstate.edu (preferred), or send the originals through campus mail to 1224 N Boomer Road.
- **Forms must be typed. Handwritten documents may be returned.**
- **Signatures must be handwritten or a certified digital signature. If done incorrectly, the packet may be returned to the Fiscal Officer.**

Card Delivery

Once the forms are processed by the Pcard Office, you will be notified by email. Bank of America will send the card directly to the address listed on the Application Form within 7-10 business days.

Important Links

Global Card Access: <https://spacardportal.works.com/gar/login>

Pcard Guidelines: <https://adminfinance.okstate.edu/procurement/pcard.html>

Pcard Site: <https://adminfinance.okstate.edu/procurement/pcard.html>

Training Site: <https://rise.articulate.com/share/qlxB-S3uNP-7uj2ldM0ChuX2pA1ISFrW>

Works: <https://payment2.works.com/works>

Contact Information

Pcard Administrator: Carla James / carla.james@okstate.edu / 405-744-8408

Pcard Shared Email Account: osu.pcard@okstate.edu



CHECKLISTS FOR PCARD MATERIALS

Checklist for Student Cardholder – if requested

Application Form (typed)

Cardholder is the treasurer or president.

No other current or former student officer has an active Pcard for this group.

CWID is correct.

Default fund number is entered and correct. Example: 1 923456

Name printed on the card must be the cardholder's legal name. Mandatory.

Single transaction limit is \$500 or less. Explain any higher limit on the application.

Cycle limit is \$2,500 or less. If higher, provide an explanation on the application.

Application includes cardholder and Fiscal Officer signatures. Pcard accountant or advisor may assist you.

Conflict-of-Interest Form is complete, signed, and dated.

Student Org Cardholder Agreement is signed and dated.

Certificate of Completion from **cardholder's** Student Organization Pcard Training.

Certificate of Completion from **advisor's** Student Organization Pcard Training. *(Student organization purchases must be preapproved by the advisor, president, and treasurer. Advisor needs to know what is allowed and prohibited on the Pcard.)*

Student Organization Signature Card is completed, approved, and attached. This document confirms the cardholder may spend the organization's funds. Mandatory.

Checklist for Advisor Cardholder – if card is requested

Application Form (typed)

Cardholder is the organization's advisor and a full-time, permanent employee.

Organization has no other advisor with an active Pcard. Only one advisor may hold a card for an organization.

CWID is correct.

Default fund number is entered. (Example: 1 923456)

Name printed on the card must be the cardholder's legal name. Mandatory.

Single transaction limit is \$10,000 or less.

Cycle limit is \$20,000 or less.

Application includes cardholder and Fiscal Officer signatures.

Conflict-of-Interest Form is complete, signed, and dated.

Student Org Cardholder Agreement is signed and dated.

Certificate of Completion from Student Organization Pcard Training is attached.

Student Organization Signature Card is completed, approved, and attached. This document confirms the cardholder may spend the organization's funds. Mandatory.

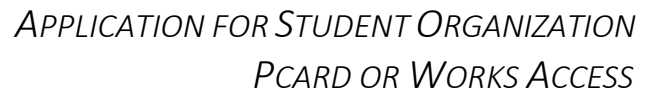
Checklist for Advisor with Approver or Accountant Roles in Works – if requested (No card)

Application Form (typed)

CWID is correct.

Application is signed by the applicant and the Fiscal Officer.

Certificate of Completion from Student Organization Pcard Training is attached.



<i>First Name:</i>	<i>Middle Initial:</i>	<i>Last Name:</i>
<i>OSU Email Address:</i>		<i>CWID:</i>
<i>Role/Title in Organization:</i>		<i>Organization's Name:</i>

University Department Address:			
City:	State:	Zip:	Country: USA
Cardholder's Business Phone:		Cell Phone:	
Default Chart and Fund: (#-#####)			

Card Requested? Yes No Legal name to be printed on card:		Limited to 21 characters, including spaces.	
Role(s) – Use checkboxes: ☐ Cardholder ☐ Approving Manager ☐ Accountant ☐ Group Proxy Reconciler ☐ Group Owner		Credit Limits (transaction/monthly): <i>[select from drop-down box]</i> • Non-students , provide justification for monthly credit limits greater than \$20,000. • Students , provide justification for transaction limits greater than \$500 and cycle limits greater than \$2,500.	

Signature of Pcard Administration/OCP-Stw _____ Date _____

Updated July 2026



PCARD CONFLICT-OF-INTEREST FORM

Name:

Organization:

The information you provide will be used only as required to report and manage conflicts of interest.

1. Do you have an interest in an entity or activity that does business with Oklahoma State University?

Yes No

2. Do you have a family member who has an interest in an entity or activity that does business with Oklahoma State University?

Yes No

3. Do you have an interest in, or relationship with, any entity or activity that could reasonably appear to affect, or be affected by, the exercise of your university responsibilities?

Yes No

4. Do you have a family member who has an interest in, or relationship with, any entity or activity that could reasonably appear to affect, or be affected by, the exercise of your university responsibilities?

Yes No

5. Do you have any other interests, relationships, or activities that could affect decisions you may make on behalf of Oklahoma State University?

Yes No

6. If you answered yes to any of the questions above, please fully explain the nature of your business interest, relationship, or activity. Include the type and name of businesses, percent of ownership, etc.

I understand I am required to make annual disclosure of financial interests which could reasonably appear to be a conflict of interest. I declare that I have used all reasonable diligence in preparing this disclosure statement, which to the best of my knowledge is true, accurate, and complete. I understand that I have a responsibility to update the above information throughout the coming year if my circumstances change.

Signature

Date



STUDENT ORGANIZATION CARDHOLDER AGREEMENT

I, as an authorized and approved cardholder, fully understand and agree to the following terms and conditions regarding the use and safekeeping of the purchase card (Pcard) entrusted to me:

1. I accept full personal responsibility for the safekeeping of the Pcard assigned or checked out to me, and understand absolutely no one, other than me, is permitted to use the Pcard or its 16-digit account number.
2. I will be making financial commitments on behalf of my student organization and will obtain fair and reasonable prices.
3. I have received training and agree to follow all policies, procedures, and guidelines established for use of the Pcard.
4. I will not use the Pcard for non-student organization related business, unauthorized purchases, or for personal purchases.
5. I understand all purchases must be preapproved by the advisor, president, and treasurer of the organization.
6. I will immediately report the theft or loss of the card to the Bank of America by phone at 888-449-2273.
7. I understand all purchases made on the student organization card are subject to sales tax.
8. I understand that the use of the Pcard does not exempt me from purchasing requirements as set forth in Oklahoma State University policy and procedures, Pcard Guidelines, State Statutes, and Campus Life.
9. I understand my Pcard may not be used for the following (refer to Pcard Guidelines for additional details and/or any updates that may be made):
 - Alcohol and Tobacco
 - Cash, Cash Advances, ATM Transactions
 - Personal Purchases
 - Purchases from University Departments or Stores
 - Gift Cards Greater than \$25.00
 - Weapons and/or Ammunition
 - Other Purchases not Permitted Under OSU Policies and Procedures, Purchasing Policies, State Statutes, and Campus Life directives.
10. I will surrender my Pcard (a) upon termination of my employment with Oklahoma State University, (b) when no longer an advisor, president, or treasurer of the student organization, or (c) at the request of my supervisor, advisor, department administration, or Pcard Administration.
11. I understand that I am not to use the Pcard as a financial reference to obtain personal credit cards or loans.
12. I understand that I am personally responsible for obtaining all original receipts (purchase and credit documents) and supporting documentation and submitting them in accordance with Pcard Guidelines.
13. I understand that failure to follow any of the above listed terms and conditions, Pcard Guidelines, policies and procedures and/or misuse of the Pcard in any manner, may result in revocation of the privilege to use the card, disciplinary action, termination of employment, and/or criminal charges being filed with the appropriate authority.

I hereby accept the above terms and conditions.

Cardholder Name Printed/Typed

Cardholder Signature

Date Signed