



P-Card Cardholder Application & Agreement

The Purchase Card (P-Card) is intended for full-time University faculty and staff who frequently purchase small dollar goods and services. Cardholders have the opportunity to purchase goods and services directly from vendors up to standard transaction amounts per the Purchasing Policy. The P-Card program streamlines the procurement process for small dollar transactions, reducing administrative burden for the University and vendors.

Email completed form, in its entirety, to purchasing-office@wittenberg.edu.

Application Steps

1. Email completed Cardholder Agreement & Application to the University P-Card Program Administrator. Please ensure all fields are completed prior to emailing.
2. Upon receipt of all required documents, the Program Administrator will schedule a face-to-face training session to ensure all P-Card information is understood prior to P-Card arriving. Please note: applicant will not be permitted to obtain a p-card until all necessary training has been completed.
3. The VISA IntelliLink system will generate a one-time use "Welcome" email for the applicant with a link to log into the system. Please do not discard this email.



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P-Card Application, Part 1 of 3

All information must be completed prior to submission.

Choose Card Type

Employee P-Card

Department P-Card

Card Applicant Name

First Name

MI

Last Name

Department Card Only

Department Name as it should appear on card

Date of Birth (MMDD)

Month (MM):

Day (DD):

This information becomes your authorization code.

Card Applicant Title

Card Applicant Email

Card Applicant Phone

Department Name

Department GL/Account Number

P-Card Reconciler/Reviewer Name

P-Card Approver Name

Card Applicant Signature/Date

Signature

Date

Supervisor Approval Signature/Date

Signature

Date

Division Head (VP) Signature/Date

Signature

Date

P-Card Admin. Signature/Date

Signature

Date



P-Card Cardholder Application & Agreement

Cardholder Agreement, Part 2 of 3

I, _____, (*print name*) hereby request a PNC VISA Purchasing Card. As an applicant, I certify that my P-Card Reviewer/Approver and I will complete all mandatory training prior to receiving my P-Card. As a Cardholder, I agree to comply with the terms and conditions below and any other policies and/or procedures as indicated in the University Purchasing Policy regarding my P-Card.

By initialing in each box below, Cardholder acknowledges their accountability for each item.

_____ I understand that I am being entrusted with a valuable purchasing tool and will be making financial commitments on behalf of Wittenberg University and will strive to obtain the best value for the University by using contracted vendors and other “preferred suppliers” as identified by the Department of Business Services.

_____ I understand the University is liable to PNC for all authorized charges made on my P-Card.

_____ I agree not to share my P-Card or card number with anyone other than a vendor with which I am doing business. I agree if I share my P-Card or card number with anyone other than a vendor I am doing business with, the University will take disciplinary action as a result.

_____ I agree to use my P-Card for approved purchases only and agree not to charge personal purchases. I understand the University will review the use of this P-Card and related management reports and take appropriate action based on any discrepancies.

_____ I agree to return the P-Card immediately upon request or upon termination of employment (including retirement) to the Human Resources Department. Should there be any organizational change that causes my employment with one department to change, I also agree to return my P-Card, if requested by Business Services.

_____ If the P-Card is lost or stolen, I agree to notify PNC, the University Program Administrator and my Approver immediately.

_____ I agree to successfully complete any annual Cardholder training, as well as sign a new employee agreement for each card renewal period.

_____ I agree not to use my P-Card to pay past-due invoices to circumvent Accounts Payable Policies and Procedures and will contact Business Services for guidance on past-due invoice payment.

_____ When returning merchandise, I will specifically request the credit to be issued to the P-Card only.

_____ I agree not to write down or share my Card’s PIN with anyone, including Reviewer, Approver, University Program Administrator, or PNC.

_____ I understand that Chip and PIN technology is only utilized at point-of-sale by vendors who have chip-enabled terminals.

_____ I will not store my card number on any mobile devices, nor will I utilize any type of mobile payment or digital wallet service such as Apple Pay, Google Pay, Samsung Pay, etc.

_____ I have read and agree to follow all Federal, State and University Policies and Procedures related to procurement/purchasing and the P-Card. I fully understand that failure to do so may result in either revocation of my privileges or other disciplinary actions, up to and including termination or employment.

Card Applicant Signature: _____ **Date:** _____



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P-Card Approver/Reviewing Responsibilities, Part 3 of 3

The Purchasing Card (P-Card) Program is designed to streamline the procurement process for small dollar transactions, reducing the administrative burden for the University and vendors. Approver/Reviewers are expected to ensure that cardholders they supervise use cards appropriately. Therefore, they are expected to know the general policies and procedures governing the University Purchasing Program.

By initialing in each box below, Approver/Reviewer agrees to:

- Approve issuance and use of cards for employees under their supervision if the employees are full-time University staff or faculty.
- Ensure proper use of card by reviewing departmental charges for accuracy and appropriateness of purchases.
- Electronically review and approve cardholder's transactions using documentation from the cardholder including, but not limited to, receipts, credit slips, reconciliation reports, or other needed justifications.
- Ensure any unusual purchases are documented in employee's file.
- Ensure credit for returned merchandise is credited directly back to the P-Card only.
- Ensure the cardholder maintains monthly reports, corresponding receipts, and other justification documents in a place accessible by approver.
- Ensure all monthly reports, receipts, and other justification documents are successfully submitted to Business Services on or before all deadlines and due dates.
- Notify the University Program Administrator, in conjunction with the Human Resources Department, of a cardholder's pending department transfer or University separation.
- Ensure cardholder signs off on outstanding charges through the VISA IntelliLink System and card is returned to Business Services prior to employee's departure.
- Revoke a cardholder's P-Card for improper use and immediately advise Business Services of the action.
- Complete mandatory P-Card training for Approver/Reviewer annually.
- Certify by electronic signoff or physical signature that the specific goods and services (1) are essential and necessary, (2) are appropriately budgeted for, (3) have been properly received, (4) are following any and all Federal, State, and University policies and procedures, and (5) directly support the mission of Wittenberg University.

Cardholder Name: _____

Printed Name of Cardholder's Approver/Reviewer

Approver/Reviewer Signature and Date



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Business Services Use Only

Cardholder Name: _____

Last 4 Digits of Card: _____

Training Completed By: _____

Training Completed On: _____

Per Transaction Limit: _____

Per Month Credit Limit: _____

Card Issued On: _____

Cardholder Signature: _____