Purchasing Card Request Form Instructions

Thank you for your interest in the College's Procurement Card (P-card) Program.

Prior to receiving a p-card request form, the requestor is advised to review the p-card criteria to assist in determining whether the individual qualifies to receive a p-card. The criteria were approved by the senior management of the College and should be strictly adhered. If the requestor meets the criteria, the Purchasing Card Request Form should be fully completed, signed by the appropriate parties and forwarded to the Purchasing Department.

Please follow these instructions to complete the Purchasing Card Request Form:

1. The top portion of the form should be completed by the requestor. This information is required by the bank to issue a p-card in the name of the requestor.

2. The bottom half of the form should be completed by the Department Head. The monthly credit limit can vary between $500 and $2,000 monthly.

3. **ATM capability is available only to employees who travel with students. No more than 10% of the monthly credit limit is approved.**

4. The approving authority is generally the immediate supervisor of the requestor. This individual is held responsible for reviewing and approving the monthly charges of the cardholder. The department head can also be the approving authority.

5. List all the organizations the requestor will be responsible for purchasing merchandise. (Most cardholders are responsible for only one organization)

6. Provide a list of the type of commodities the requestor will have permission to purchase. This information will assist Purchasing in placing the requestor in the correct merchant category grouping.

7. The department head is required to sign on the line titled "Approved by"

8. Meet with the approving authority and review their responsibilities with them to ensure they are aware of what their role will be as an Approving Authority. (Approving Authority's Role)

9. Obtain signatures from the approving authority, the president/vice chancellor and forward the signed P-Card Request Form and the Approving Authority documents to the Purchasing Department.
P-Card Criteria

Employees of San Jacinto College District who meet anyone of the following categories and conditions are eligible to receive a MasterCard.

Categories:

1. **Employee Travel**: Conferences, Presentations, Professional Development, and Product/Service/Grant Evaluations
   **Conditions**: Must travel three (3) times per year

2. **Student Travel**: Athletics, Clubs, Instructional Field Trips, and Field Supervision
   **Conditions**: None

3. **Small Dollar Purchases**: Any line item $500.00 or less
   **Conditions**: Requestor utilizes at least twenty (20) different vendors annually and vendors who will not accept a purchase order

Special circumstances for employees who do not meet the criteria should provide a written request justifying their need for a p-card. Only the president or vice chancellor can grant approval of the written request.
(To be completed by requestor)

SAN JACINTO COLLEGE DISTRICT
PURCHASING CARD REQUEST FORM

TO: DISTRICT PURCHASING CARD ADMINISTRATOR
A purchasing card request should be processed for the individual listed below:

Applicant's Full Name ____________________________________________
(Type or print clearly)

Campus _________ Department ____________________ Work Phone #____________

G #_________________________ Last 4 digits of Social Security #____________

Work E-mail Address______________________________________________

Banner's FOPAL used most often with P-card (23 digits #)________________________

(To be completed by Department Head)

Monthly Credit Card Limit __________

Assign Approving Authority of Applicant ___________________________
(Individual responsible for reviewing and approving the applicant's monthly charges)

The applicant is approved to charge against the following organizations ________________

The applicant has permission to purchase the following commodities: (circle commodity or add a specific category) All travel, restaurants, consumable supplies, grocery stores ________________

Approved by: ____________________________________________ Director of Grants Management
(if utilizing grants-related budget)

President or Vice Chancellor ________________ Director of Contracts & Purchasing Services

NOTE: NO FIXED ASSETS MAY BE PURCHASED WITH PURCHASING CARDS. LINE ITEM COST CANNOT EXCEED $500.00 EXCEPT FOR TRAVEL. EXPENDITURES OVER THIS LIMIT MUST BE PROCESSED ON A REQUISITION.
APPROVING AUTHORITY RESPONSIBILITIES

The Department Manager will assign an Approving Authority for each P-card approved application request. The Approving Authority must review this document and agree to accept the responsibilities stated within: Responsibilities include:

- Reviewing vendor receipts attached to the transaction log to ensure the purchase is for legitimate college business.
- Reviewing Cardholder transactions on the monthly statement issued by the bank and comparing the purchases with the transaction log prepared by the cardholder.
- Signing the transaction log and giving it back to the cardholder for forwarding to Purchasing Department by the 15th of each month. Your signature confirms the purchase is approved by you.
- Notifying the Director of Purchasing immediately of any suspicious activity or unauthorized purchases the cardholder may have made.
- Requesting the P-Card Administrator to cancel a Cardholder’s card (e.g. terminated employees, transferring departments, loss of MasterCard privileges) as approved by President, Vice President/Vice Chancellor.
- Approving/denying cardholder’s request to increase their spending limits.
- Contacting the P-Card Administrator to make spending adjustments on the cardholder’s p-card.
- Collecting canceled cards from Cardholders and forwarding them to the P-card Administrator.
- Assigning an approving authority in your absence.
- Working in confidence with the P-card Administrator to resolve any dispute and/or questionable activity involving the cardholder.

I, ____________________________ (Appointing Authority), hereby acknowledge receipt of this document which explains my responsibilities as an Approving Authority for the San Jacinto College District MasterCard Purchasing Card. As the approving authority for:

______________________________ (p-card applicant’s name),

I accept and agree to comply with the responsibilities stated in this document and all purchasing card procedures.

______________________________

(Approving Authority Signature)

☐ New Issue

☐ Transfer of Responsibilities

Date