



PURCHASE CARD APPLICATION/AGREEMENT  
INDIVIDUAL CARD

**A. Card Holder Information, per TSK-U5348.04A** **Date of Pcard Training:**

\_\_\_\_\_  
 Last Name                      First Name                      MI                      Title

\_\_\_\_\_  
 Universal Login              Campus Phone              Home Phone              Campus Email

**B. Department Information**

\_\_\_\_\_  
 Department Name                      Building                      Room                      Campus Mail Stop

**C. Approving Official Information, per TSK-U5348.04B** **Date of Pcard Training:**

\_\_\_\_\_  
 Last Name                      First Name                      MI                      Title

\_\_\_\_\_  
 Universal Login              Campus Phone              Campus Email

**D. Accounting Information**

Fast Index	Fund	Orgn	Acct	Proj	Actv	Locn
			E111			

**E. Purchasing Card Controls** (*The University sets standard transaction limits*)

Single Transaction Limit	Daily Spending Limit	Monthly Spending Limit	Transactions per Day
\$3,000	\$10,000	\$10,000	10

If a lower limit is desired, please indicate below:

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**E. Comments**

Please enter any comments related to this user or account:

**For Office Use Only**

Application Rec'd: \_\_\_\_\_ Empl Verified: \_\_\_\_\_ BA Verified: \_\_\_\_\_ Database Entry: \_\_\_\_\_ Card Ordered: \_\_\_\_\_ Distributed: \_\_\_\_\_

**User Setup:**  
 Hierarchy: \_\_\_\_\_ Role: \_\_\_\_\_ Scope: \_\_\_\_\_ Distr. Group: \_\_\_\_\_ User ID: \_\_\_\_\_ Init: \_\_\_\_\_

**Approver Setup:**  
 Hierarchy: \_\_\_\_\_ Role: \_\_\_\_\_ Scope: \_\_\_\_\_ Distr. Group: \_\_\_\_\_ User ID: \_\_\_\_\_ Date: \_\_\_\_\_



**F. Financial Manager Signature**

As the Financial Manager, I approve of the Pcard participation of the name stated in Section A. My responsibilities will continue to ensure that department personnel will comply with dollar limits and other University Policies and Procedures requirements for purchasing goods and services using a Pcard.

I take full administrative responsibility for the action the Cardholder and I approve the limits set forth in Section E of this agreement.

I designate the following Budget Authority listed in Section F to approve all transactions to this account on my behalf:  
**(Only check box if Financial Manager is assigning Budget Authority, as stated in Section F)**

\_\_\_\_\_  
Print Name of Financial Manager

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**G. Budget Authority Signature**

As the Budget Authority, I will monitor and accept full responsibility of approval for all Pcard activities on behalf of the Financial Manager.

I designate the Approver in Section C to approve all transactions in the online data system on my behalf. I take full responsibility for the action of the Approver.  
**(Only check box if Budget Authority is assigning Budget Authority, as stated in Section C)**

\_\_\_\_\_  
Print Name of Budget Authority

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**H. Card Holder Signature**

- As a Cardholder, I agree to accept the responsibility for the protection and proper use of this Purchasing Card.
- I acknowledge and agree to release to the financial institution my birthdate to meet the requirements of the Office of Foreign Assets Control and the Patriot Act Section 326, Verification of Identification.
- I also acknowledge that all purchases must comply with state, agency and purchasing statutes, rules, policies, and procedures.
- I understand that this Procurement Card is to be used for Western Washington University business purchases only and is NOT to be used for any personal purchases.
- Upon my termination from the University or re-assignment, I will immediately surrender my Purchasing Card to my Approving Official/Budget Authority.
- **My signature affirms that I have read and agree to comply with the terms and conditions of this agreement.**

\_\_\_\_\_  
Signature of Cardholder in Section A

\_\_\_\_\_  
Date



## Individual Pcard Application/Agreement Instructions

Cardholders must complete the Online Pcard training session before completing a *Purchase Card Application/Agreement – Individual Card* application.

The Cardholder (CH) is the person issued an Individual Purchasing Card to make purchases and is the only individual authorized to use the card. The CH is responsible for the security of the Pcard and all transactions made against the Pcard. The CH must notify the bank immediately if the Pcard is lost or stolen. The CH documents, reviews and reconciles transactions on the online data system.

The CH must complete and pass the mandatory Pcard Training, before completing this application. CH must comply with the State laws as defined in the State Administrative & Accounting Manual (SAAM), Purchase Card Program 45.10, University Policies, and Procedure and to understand the list of prohibited and restricted purchases.

### How to Complete the Purchase Card Application/Agreement – Individual Card Form:

**Section A, Card Holder:** Write the name of the designated Card Holder. Your Universal Login will be your PaymentNet login. A home phone number is requested in case unusual card activities occur during non-business hours and the bank needs to contact you.

**Section B, Department Information:** Write the complete name of the Card Holder department.

**Section C, Approving Official Information:** The approving official is assigned to monitor, review, and approve card transactions to ensure compliance with purchase card policies and procedures. The Approver must hold a position at a higher authority level than the Card Holder. If you do not know who your Approver should be, please ask your Budget Authority or Financial Manager. The transaction Approver is designated by the Financial Manager.

**Section D, Accounting Information:** The Pcard account will require a default budget string. We recommend using a FAST INDEX. The budget information can be changed during the PaymentNet review and approval. The default expenditure account code will be E111 and can be changed in during the review/approval process to reflect the appropriate account code for the transaction. The Financial Manager or Budget Authority designates the appropriate budget string. **NOTE: For setup purposes in the system, please provide your ORGN Code.**

**Section E, Purchasing Card Controls:** The maximum transaction dollar amount and the number of transaction per day is set based on the university standard and stated on the agreement. If you prefer a lower limit, please indicate in this section. Higher limits are assigned on an individual basis.

**Section F, G, H:** All sections on page two must be read and signed by the designated authorities.

You should receive your Pcard within 2 weeks after the application is received and the approver application is complete.

***Please complete, print and sign the application and then forward to the Pcard Administrator, MS-1420.***