RowanUniversity
OFFICE OF CONTRACTING
& PROCUREMENT

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# Purchasing Card (P-Card) Account Request Form Instructions

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| Box 1. Employee Name | Name of employee requesting a p-card. |
| Box 2. Banner ID | Banner ID of employee named in Box 1. |
| Box 3. Employee Email | Rowan email address of employee named in Box 1. |
| Box 4. Employee Title | Official title of employee named in Box 1. |
| Box 5. Division or College And Department | Administrative Division (e.g. Finance, Student Affairs) OR College (e.g. Business, Engineering) **AND** Department (e.g. Budget, Rec Center). |
| Box 6. Building Name and Office/Suite Number | Building/Hall name of employee named in Box 1 **AND** office number or suite number |
| Box 7. Employee Phone | Full 10-digit phone number of employee named in Box 1. |
| Box 8. Administrative Asst. | Name of administrative assistant of employee named in Box 1. |
| Box 9. Administrative Asst. Banner ID | Banner ID of employee named in Box 8. |
| Box 10. Administrative Asst. Phone Number | Full 10-digit phone number of employee named in Box 8. |
| Box 11. Administrative Asst. Email Address | Rowan email address of employee named in Box 8. |

Box 12. Please indicate if the employee named in Box 8 will have the role of Proxy Reconciler. This role's duties are to manage p-card transactions in Works®. This includes uploading receipts and allocating the correct Account Code to each purchase.

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| Box 13. Fund-Org-Program | This is the F-O-P in FOAPAL. Cards are set up to default to the information provided here. The only fields that can be free keyed are Account Code and Justification. The FOAPAL entered in Box 13 **MUST** correspond to a budget the employee named in Box 8 has been granted access to through Finsecurity. A good rule of thumb is if you can enter a requisition against the FOAPAL, then it is also appropriate for this purpose. |
| Box 14. Intended Use. | You are required to include a rationale for issuing a p-card. If The official job duties of the requestor require travel or special purchases, you must notate that here. Filling out a request form does not guarantee issuance of a card. |
| Box 15. Acknowledgement | The requestor should read this clause carefully. By signing here, the potential p-card recipient agrees to specific use and care of the p-card privilege. |

## Purchasing Card (P-Card) Approver Acknowledgment & Information

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| Box 1. Approver Name | Name of budget manager/chair/director etc. of employee named in Box 1 of the Request Form. |
| Box 2. Approver Banner ID | Banner ID of Approver named in Box 1 of this form. |
| Box 3. Approver Email | Rowan email address of Approver named in Box 1. |
| Box 4. Approver Title | Official title of Approver named in Box 1. |
| Box 5. Division or College And Department | Administrative Division (e.g. Finance, Student Affairs) OR College (e.g. Business, Engineering) **AND** Department (e.g. Budget, Rec Center). |
| Box 6. Building Name and Office/Suite Number | Building/Hall name of Approver named in Box 1 **AND** office number or suite number |
| Box 7. Approver Phone | Full 10-digit phone number of Approver named in Box 1. |
| Box 8. Administrative Asst. | Name of administrative assistant of Approver named in Box 1. |
| Box 9. Administrative Asst. Banner ID | Banner ID of employee named in Box 8. |
| Box 10. Administrative Asst. Phone Number | Full 10-digit phone number of employee named in Box 8. |
| Box 11. Administrative Asst. Email Address | Rowan email address of employee named in Box 8. |

Box 12. Please indicate if the employee named in Box 8 will have the role of Delegated Approver. This role's duties are to review transactions in Works® and approver or flag a purchase on behalf of the Approver.

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| Box 13. Acknowledgement | The Approver should read this clause carefully. By signing here, the Approver agrees to manage transactions in a timely manner within the Works® environment. It also holds the Approver responsible for training and other requirements if the account request is approved. |
| Box 14. Next Reporting Level P-Card Approval | Signature of College Dean, Divisional VP or Provost/Chief of Staff. This is the supporting upper level endorsement for supporting the issuance of a p-card. Unless this individual is also the Approver, there are no further tasks involved. |