

# CardQuest

## Request for P-Card

Mail completed forms to P-Card Services, M/C 103-6 or email to PCardServices@caltech.edu

<b>Cardholder Information:</b>	(select one)	<b>Faculty</b>	<b>Staff</b>	<b>Student</b>
Name (as you would like it printed on your P-Card) _____				
Phone Number: _____		Mail Code: _____		
Caltech UID Number: _____		Default Department Code: _____		
Email Address: _____				
Default PTA: _____				
Comments: _____				

<p><b>Card Options and Roles:</b></p> <p><b><u>Card Options: select all that apply</u></b></p> <p>Goods and Services</p> <p>Travel: individual authorized to use P-Card for travel</p> <p>PIN number for cash advance</p> <p><b><u>CardQuest Roles: select all that apply</u></b></p> <p>Cardholder: individual named on the card and authorized to make purchases</p> <p>Cardholder with Delegate: indicate delegate</p> <p>Approver</p>	<p><b>Delegate Information (if different from cardholder)</b> Check if N/A</p> <p>Name: _____</p> <p>Email Address: _____</p> <hr/> <p><b>Travel Portal Arranger (if different from cardholder)</b> Check if same as delegate      Check if N/A</p> <p>Name: _____</p> <p>Email Address: _____</p> <p>Work Phone: _____</p> <hr/> <p><b>Authorizer: I hereby authorize the above referenced cardholder to fulfill the role described.</b></p> <p>Name: _____</p> <p>Email Address: _____</p>
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<p><b>Expense Approver: I understand that I am responsible for the proper use of the credit card to ensure charges are posted to the appropriate accounts, and to maintain proper recordkeeping of all transactions.</b></p>	
Name: _____	Signature _____
Email Address: _____	



## P-Card Policy Acknowledgement

Send completed form to P-Card Services, M/C 103-6

**Violations and misuse of Caltech’s Purchasing Card (P-Card) include, but are not limited to:**

- Buying prohibited items – see page 4, <http://procurement.caltech.edu/documents/128-pcardpolicy.pdf>
- Not performing the prescribed monthly reconciliation on the designated date and time as noted in the automated email notification or company message in CardQuest (Goods & Services)
- Splitting transactions on one or multiple cards to circumvent the single purchase limit assigned to the individual card
- Physical sharing of cards
- Personal charges – the Institute will consider these fraudulent transactions
- Failure to submit the original paper receipts in a timely manner
- Failure to submit Travel Expense Report within 30 days of the trip end date
- Using the cash option to reimburse Travelers or to purchase goods and services

Violations of the P-Card Policy and misuse of the P-Card may result in disciplinary action up to and including: notice to expense approver, retraining, card suspension, card revocation, and other disciplinary action as deemed appropriate by the Division/Dept. or P-Card Dept.

I certify that I have read and understand the P-Card Policy and Procedures on the appropriate use and handling of the California Institute of Technology’s Purchasing Card, have completed the required training, and do agree to comply with the conditions for the Purchasing Card’s use. The Purchasing Card will be a MasterCard and will be referred to as the Caltech P-Card.

I understand that failure to comply with these conditions may result in the withdrawal of the privilege of participating in in the program. I also certify that I will not be making any personal purchases on the card. I further understand that purposeful fraudulent or negligent behavior on my part regarding the proper use or protection of the P-Card will be considered serious misconduct and may result in disciplinary action.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Division/Department