



PROCUREMENT CARD CARDHOLDER ACCOUNT FORM INSTRUCTIONS

FOR NEW ACCOUNTS:

- 1) Use capitalization for all input (except email addresses).
- 2) DO NOT use hyphens in the Default Account Number fields.
- 3) DO NOT use commas or decimals in the Cycle Spending Limit or Single Purchase Limit fields.
- 4) All fields MUST be completed in the Cardholder Information and Approving Official sections.
- 5) 5-3 accounts cannot be used as a default. Use another departmental account and reallocate back to the 5-3 account.
Exception: A 5-3 account MAY be approved as a default for a PI who has ONLY a 5-3 to charge. Requests for this exception will be reviewed by Sponsored Programs on a case-by-case basis. Please complete the [PCard Approval Request for 5-3 Account as Default](#) form and forward it to: Office of Sponsored Programs, 2002 Campus Delivery.
One form per Cardholder please.
- 6) Check the appropriate box in the Business Need Justification section.
- 7) Obtain Approving Official and Department Head* or Director* signature and forward the original to Procurement Services.
*Dean or VP if applicant is a Department Head or Director
- 8) Complete Official Function Status section **ONLY** if official function status is requested for the Cardholder and obtain appropriate signatures for the type of Cardholder access being requested.

FOR ACCOUNT CHANGES:

- 1) Check the Change box and input the Cardholder Account Number, Cardholder Name and CSU Employee ID number.
- 2) Input only those fields that pertain to the change (follow the guidelines listed above).
- 3) Obtain Approver signature and forward the original to Procurement Services.

TO DELETE A CARDHOLDER ACCOUNT:

- 1) Check the Delete box and input the Cardholder Account Number, Cardholder Name and CSU Employee ID number.
- 2) Obtain Approver signature and forward the original to Procurement Services.