

# 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: _____	_____	_____	_____
First	M.I. (optional)	Last	
Phone Number: _____		Mail Code: _____	
Caltech UID Number: _____		Default Department Code: _____	
Email Address: _____			
Default PTA: _____			
Comments: _____			

<b>Card Options and Roles:</b>	<b>Delegate Information (reconciles/receives email notices for cardholder)</b> Check if N/A
<b><u>Card Options: select all that apply</u></b>	Name: _____
Goods and Services	Email Address: _____
Travel: individual authorized to use P-Card for travel	
Cash availability (travel use only)	<b>Travel Portal Arranger (arranges travel on behalf of cardholder)</b> Check if same as delegate Check if N/A
<b><u>Cardholder Roles: select one</u></b>	Name: _____
Cardholder: reconciles own charges	Email Address: _____
Cardholder with Delegate: delegate reconciles	Work Phone: _____
<b><u>Approver Role: select if applicable</u></b>	<b>Authorizer: I hereby authorize the above referenced cardholder to fulfill the role described.</b>
Approver: approves expense reports in CardQuest	Name: _____
	Email Address: _____

<b>Expense Approver (other than cardholder listed above): 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 ensure proper documentation is attached to the transactions.</b>
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: [https://procurement70.sites.caltech.edu/documents/7331/p-card\\_policy.pdf](https://procurement70.sites.caltech.edu/documents/7331/p-card_policy.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 Visa Card 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 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