Treasurers of Campus Organizations may request a p-card for other officers in their organization in Workday. Before starting a p-card application please have the following ready:

- The full legal name and phone number of the person who should receive the p-card.
- The name of the organization advisor who should approve the request.
- A completed Cardholder Agreement from the person who will receive the p-card.
- Please make sure the person who will receive the p-card is listed in the Student Organization Database as an officer.

Step One: Navigate to the Request

First, you will need to find the request form. Sign into Workday, and on the homepage you will see one of the tiles in the Applications box is labeled Requests. Click Requests.

On the Requests screen, click Create Request.

Under Request Type, first select All and then Card Application – Campus Org (P-Card). Once selected, click OK at the bottom of the screen.
Step Two: Filling the Request Form

All fields are required on the application, and will be reviewed by COA Staff. A description of each field, and what should be included in that field are below:

**Describe the Request:** Please provide a description of the applicant and organization associated with this request.

**Full Legal First Name of the Purchasing Card Applicant:** Please enter the legal first name/given name of the applicant. Nicknames or names which are not the legal name of the applicant cannot be accepted on the application.

**Full Legal Middle Name of the Purchasing Card Applicant:** Please enter the middle name of the applicant. You may need to ask the applicant for this information. NA may be entered only if the applicant has no middle name. A middle initial in place of a name cannot be accepted on the application.

**Full Legal Last Name of the Purchasing Card Applicant:** Please enter the last name/family name of the applicant.

**Telephone Number of Purchasing Card Applicant:** Please enter the telephone number for the applicant in this format: xxx-xxx-xxxx

**Student Org Worktag:** Please enter your program worktag in this format: PGxxxxxx. A short description of how to find this information is available here: [What is a Program Worktag](#)

**Organization Name:** Please enter your Organization Name as it appears in the Student Organization Database. Do not use initials, or former name for your organization. [Student Organization Database](#)

**Officer Title of Purchasing Card Applicant:** Please enter the officer title for the applicant as it appears in the Student Organizations Database. Only those who are listed in the database as officers are eligible to hold a p-card.

**Requested Transaction Limit:** Please enter an amount from $1-$1000. To help determine what transaction amount may be needed for your organization, please consult your advisor. Amounts in excess of $1000 will require a memo from your advisor explaining the need for a higher transaction limit. (Only treasurers can attach documents- the memo can be attached at the bottom of the form).

**Requested Monthly Limit:** Please enter an amount from $1-$5000. To help determine what monthly spending limit may be needed for your organization, please consult your advisor. Amounts in excess of $5000 will require a memo from your advisor explaining the need for a higher monthly limit. (Only treasurers can attach documents- the memo can be attached at the bottom of the form).

**Student Org Advisor who will be approving the request:** Please enter the name of the organization advisor who should approve your request. The advisor must be listed as your advisor in the Student Organization Database. If you have multiple advisors, you will only need to enter one name.

**Cardholder Agreement Statement (the last section):** Since your request is for another officer in your organization, you will attach the completed cardholder agreement you received from the applicant, which must be completed by the applicant and not the treasurer. Select the second radio button, which will allow you to attach the completed form.

When all information has been entered, click **Submit**. The form will first route to Campus Org Accounting for review, then to your specified advisor for approval, before being sent to the P-Card Administrator at which time the card will be ordered. You will receive Workday notification when your request has been approved, or if it needs further clarification.