Treasurers of Campus Organizations will request the p-card(s) 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.
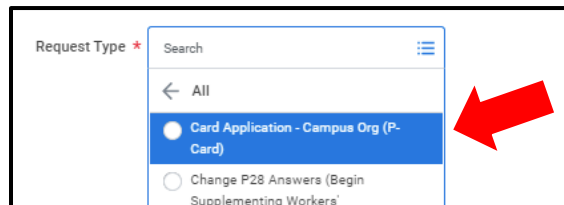
Initiating the Request

The treasurer will:

1. Log into Workday
2. Access *Create Request* though either the Requests application icon on the Global Navigation menu (red arrow below), or by typing "create request" in the search bar.

3. Under *Request Type*, first select *All* and then *Card Application – Campus Org (p-card)*. Once selected, click *OK* at the bottom of the screen.

Completing 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:

Full Legal First Name of the Procurement 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 Procurement Card Applicant: Please enter the middle name of the applicant. 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 Procurement Card Applicant: Please enter the last name/family name of the applicant.

Telephone Number of Procurement 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.

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 Procurement 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*.

Approval Routing and Processing

Once submitted, the request routes through several approvals before the card is ordered and the request is closed.

1. The treasurer will fill out and submit the request in Workday
2. The COA Student Accountants will review the request for accuracy and completeness, as well as verify the status of your organization and that the Treasurer has completed the current school year's Treasurer Training in Canvas.
3. The request will be sent to the organization advisor to review and approve the request.
4. The request will be sent to the COA P-card Administrator to order the card and close the request. At that time the request closes, the treasurer will receive Workday notification that the request is approved. This means that the card has been successfully ordered. Please anticipate a week for the p-card to be made available.
5. Once ready, the new cardholder will receive an email from coa@iastate.edu that the card is ready for pick-up.

Any request a treasurer makes in Workday can be reviewed to see if it is complete, or where it is in the process by using the *ISU My Requests* report.

Campus Organizations Accounting   (515)294-1633
1580J Memorial Union   coa@iastate.edu