

Campus Organizations Accounting- P-card Application Process for Treasurers

Treasurers of Campus Organizations will request a p-card for themselves Workday. Before starting a p-card application please have the following ready:

- The name of the organization advisor who should approve the request
- Your own information

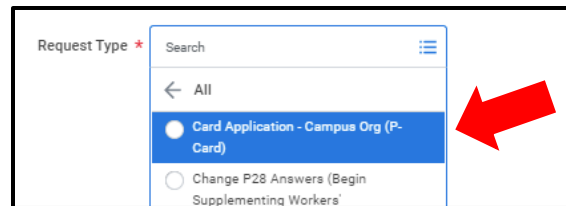
Initiating the Request

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.



4. The request form will appear. Please complete as described:

Describe the Request: Please provide a short description with your organization name, and that you are treasurer and applicant for your organization.

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

Full Legal Middle Name of the Procurement Card Applicant: Please enter your middle name. NA may be entered **only** if you have 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 your last name/family name.

Telephone Number of Procurement Card Applicant: Please enter your telephone number 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 a previous/former name used by your organization. [Student Organization Database](#)

Officer Title of Procurement Card Applicant: Please enter your title (Treasurer). Continued page 2

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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 yourself, you should review the statement in this section, and then select the button stating that you have read and agree to the statement.

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 your p-card to be made available.
5. Once ready, you will receive an email from coa@iastate.edu that your 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 in Workday.