Campus Organizations Accounting- Temporary P-Card Limit Increases

Temporary limit increases on Organization P-Cards are requested through Workday. Only treasurers will have the ability to access the request. Cardholders (who are not treasurers) who need a limit increase should provide the information below to their organization treasurer so they can quickly and accurately complete the request on the cardholder's behalf.
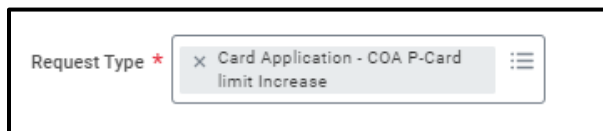
Initiating the Request

The treasurer will:
1. Log to Workday
2. Access *Create Request* though either the *Requests* application icon on the Global Navigation menu (red arrow below), or by searching for the task "create request" in the search bar.

3. Select *COA P-Card Limit Increase* in the list of requests, or type "limit increase" in the *Request Type* box.

The request form will appear. All fields are required. An attachment can be added, but is not necessary. A list of the fields with detailed descriptions of what to put in each is below

Describe the Request: Please add a short description of the reason the request is needed.

Full Legal Name of Cardholder: Write in the full name of the cardholder whose card should be increased.

Organization Name: Please write the full name of your organization (No abbreviations please!)

Student Org Program Worktag: Write in your organization Program Worktag in the format "PGXXXXXX".

Name of Advisor: Write in the name of the organization advisor who should approve this request if needed. If you have more than one advisor, please only write in one name, as only one advisor will approve the request.

Last four digits of P-Card: Enter the last four digits of the organization p-card that should be increased.

Single Transaction Limit Requested: Write in the requested single transaction limit, or N/A if this limit does not need to be increased

Monthly Transaction Limit Requested: Write in the requested monthly transaction limit, or N/A if this limit does not need to be increased. The credit card monthly cycle goes from the 13th of the month to the 12th of the following month.

Start and End Dates: In these fields you will select the start and end dates on a calendar. The time frame must be at least one week, and not more than one month without prior approval.

Items being purchased or purpose: Write in what purchases or activities have prompted this request.

Request Routing and Approvals:

Once submitted, the request will route to:

1. The COA Student Accountants, who will review the form for completeness and accuracy
2. The organization advisor who will approve the request
3. The P-Card Administrator will increase the limits on the card, and close the request.
4. The treasurer will receive notification when the request is fully approved and the limits have been increased by email and through the notifications in the requestor's Workday account.

You may check the status of your request at any time by using the *ISU My Requests* report in Workday.

If your request is sent back for correction or adjustment, you will Workday notification, and will be able to see comments and make corrections before resubmitting through your Workday inbox. Any request or transaction that needs correction will be available through the inbox, and will have send back comments at the bottom of the form.

Your limit increase will expire on the date you enter for the end date. Please create a new request for cardholders as needed!

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Other information about limit increases:

- The COA staff takes every effort to process limit increases quickly, we recommend alerting your advisor that they will need to approve the request in Workday if you have a very short time frame to have your request processed. See page two of this document for an overview of the approval process, and a link for how the treasurer can review the status of a request.
- The default limits for a cardholder's P-Card can be found in that cardholder's Workday profile:
    - Go to your profile
    - Select "Overview" from the menu on the left
    - Go to "Credit Card" from the tabs along the top of the "Overview" screen
- Please allow time for all approvals on the request, and also time for the transaction to be processed by the vendor. Extremely short time frames on requests often lead to multiple requests in order to have the needed transaction process.
- This request is for a temporary limit increase, and increased limits of more than one month will only be processed on a limited basis. If you have special circumstances please attach justification to the request, or email the P-Card Administrator Tim Livengood, tliven@iastate.edu, with details on why the card will need an extended increase past one month.