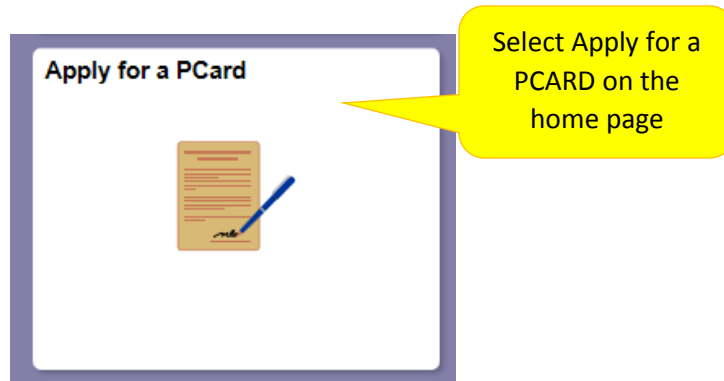


## Process for Applying for a NEW Purchasing Card



Prior to submitting an application for a new PCARD, you will need to read and electronically sign the PCARD agreement. The electronic signature is at the bottom of the agreement.

Applications need to be made by the person requesting the PCARD.

The screenshot shows a web application interface for "PCard Agreement, Application". The top navigation bar includes a back arrow and "My Williams" on the left, and "PCard Agreement, Application" on the right. Below the navigation bar is a sidebar with two menu items: "PCard Agreement" (highlighted in green) and "PCard Application" (highlighted in yellow). The main content area is titled "PCard Agreement" and contains the following sections:

- General Policy Guidelines**
  - All purchases made with the Purchasing card are subject to the Williams College Travel and Business Guidelines.
  - Purchasing cards are issued at the discretion of the department supervisor with the approval of the Controller or the Associate Controller.
- Ownership and Cancellation of the Purchasing Card:**
  - The Williams College Purchasing Card is the property of Bank of America. It may not be transferred to, assigned to, or used by anyone other than the assigned Cardholder. Bank of America or Williams College may suspend or cancel Cardholder privileges at any time for any reason. The Cardholder will surrender the Williams College Purchasing Card upon request, to any authorized agent of Williams College or Bank of America. Use of the Purchasing Card or account after notice of its cancellation may be fraudulent and may cause Williams College to take legal action against the cardholder.
- Separation from the institution:**
  - It is the cardholders responsibility to turn in their card upon separation from the institution to their immediate supervisor or the Controller's Office

My Williams **PCard Agreement , Application**

PCard Agreement

PCard Application

- The receipts along with an original invoice with the items or services listed in detail should be submitted with the statement.

**Sales and Use Tax**

- Because the college is a nonprofit organization it enjoys the benefit of not having to pay tax on goods and services. When ordering please inform the supplier of this status and if any further information is needed please email [pcard@williams.edu](mailto:pcard@williams.edu).

**Disputed Items - CRITICAL AND TIME SENSITIVE**

- It is the Cardholders responsibility to follow-up on any erroneous charges, returns or adjustments and to ensure proper credit is applied on subsequent statements.
- Suspected Fraud: Cardholder must respond to Bank of America inquiry and notification of possible fraud. **NOTE: the period of time available to report fraud or errors is 60 days from transaction date.**
- Please review your transactions on a timely basis. They are available to view daily.

**Protecting the Corporate Purchasing Card**

- The Williams College Purchasing Card is valuable property that requires proper treatment by the Cardholder to protect it from misuse by unauthorized parties.
- Validation/Safekeeping: Sign the card immediately upon receipt. When the expiration dates has passed and/or after you have received a new Purchasing Card, cut the old Purchasing Card in half and dispose of it.

**Lost/Stolen Corporate Purchasing Cards:**

- If the Purchasing Card is lost or stolen contact Bank of America immediately at (888) 449-2273 and email [pcard@williams.edu](mailto:pcard@williams.edu)

**The undersigned Williams Purchasing Cardholder applicant has read the above agreement and guidelines and agrees to be bound by the terms and conditions.**

---

Name **Jolin,Karen P.** Empl ID 16

I have read and agree to the terms of the WMS PCard Policy Signed Date

The entire College PCARD policy can be found on your home page in the tile “College PCard Policy” or the Controller’s Office WEBSITE.

Once the Agreement has been electronically signed you will receive an email confirmation for your records. You will automatically be directed to the PCARD application.

Agreement has been signed. An email confirmation will be sent shortly (0,0)

My Williams PCard Agreement , Application

PCard Agreement

PCard Application

### PCard Application

Find an Existing Value | Add a New Value

---

Empl ID

Request ID

Find an Existing Value | Add a New Value

Complete application. Required information is noted with asterisks. Missing information will be required before submittal.

PCard Agreement , Application

[New Window](#) | [Help](#) | [Personalize Page](#)

PCard Application

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Empl ID  Request ID

Name  Title:

\*Address Line 1 (Office)

Address Line 2 (Office)

\*City

\*State

\*Postal Code  Work Phone

Department  Controller's Office

Cardholder's Email Address

\*Credit Amount

Single Purchase Limit

**Cardholder is (select one)**

Faculty
  Employee
  Student

**Default PeopleSoft Account**

\*Fund Code  Department  Project

**Individuals who need access in PeopleSoft**

Name of proxy1

Name of proxy2

Name of proxy3

Cardholder's Signature on Agreement  Signed Date

Status : Not yet submitted for mgr appr

Once submitted, the application will be reviewed by authorized approvers. You will be notified once approved.

If you have questions or issues, please contact [pcard@williams.edu](mailto:pcard@williams.edu) or call Lisa Gazaille at 597-4002.