

# CLEMSON UNIVERSITY PURCHASING CARD REQUEST AND AGREEMENT FORM

Complete **ALL** fields and mail typed form to: Lynn Crawford, Clemson Centre, 391 College Avenue, Suite 203, Clemson, SC 29634

**\*\*This form MUST be typed (with the exception of the 3 required signatures) - handwritten forms will not be accepted\***

## SECTION 1: CARDHOLDER INFORMATION

Cardholder Name \_\_\_\_\_ Primary Phone # \_\_\_\_\_

Cardholder E-mail \_\_\_\_\_ Secondary Phone # \_\_\_\_\_

Department Name \_\_\_\_\_ Department # \_\_\_\_\_

Approver's Name (Cardholder's Supervisor) \_\_\_\_\_

## SECTION 2: LIAISON INFORMATION - *person responsible for completing accounting information*

Liaison Name \_\_\_\_\_ Primary Phone # \_\_\_\_\_

Liaison E-mail \_\_\_\_\_ Secondary Phone # \_\_\_\_\_

Department Name \_\_\_\_\_ Department # \_\_\_\_\_

Department Address \_\_\_\_\_

## SECTION 3: AUTHORIZATION

Cardholder Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Cardholder Billing Address \_\_\_\_\_  
**(complete with ZIP CODE)**

Cardholder Physical Address \_\_\_\_\_  
**(if different from above)**

Department Name \_\_\_\_\_

Department # (4 digits) \_\_\_\_\_ Budget Center \_\_\_\_\_

Default Account # \_\_\_\_\_

Department Head: \_\_\_\_\_ Date: \_\_\_\_\_

**(REQUIRED) ACTUAL SIGNATURE & PRINTED NAME**

I delegate transaction authority to the above cardholder and agree that the department liaison will be responsible for reviewing the transactions of the cardholder, to ensure the appropriate use and classification for a University expenditure. I further agree that my signature authorizes the Comptroller's Office to charge my departmental default account for all cardholder transactions which have not been processed in a timely manner.

Business Officer: \_\_\_\_\_ Date: \_\_\_\_\_

**(REQUIRED) ACTUAL SIGNATURE & PRINTED NAME**

## CARDHOLDER AGREEMENT FORM

The Purchasing Card is a VISA credit card issued by Bank of America. It is a flexible purchasing tool that offers an alternative to the existing University purchasing process and provides an efficient and effective method of payment for items purchased under \$2,500. The success of the purchasing card depends on departmental cooperation and adherence to the State of South Carolina and Clemson University purchasing guidelines.

### By accepting the card, the individual agrees to:

1. Adhere to all State, Federal, and University purchasing regulations within established limits.
2. Secure the PCard from possible theft or misuse.
3. Immediately notify BANK of AMERICA Fraud Department @ 1-866-500-8262 or 1-888-449-2273 in the event the card is lost or stolen. Charges made with the card up to the point of notification will be the responsibility of the cardholder.
4. No personal charges are allowed to be made with the card.
5. Provide documentation which clearly identifies each item purchased with the card.
6. Establish the Separation of Duties between purchasing, payment and reconciliation of expenses.
7. Return the card if terminating employment with Clemson University or transferring to a department no longer associated with the account number listed.
8. Take responsibility for all expenses charged to the card.

### BILLING DISPUTES

In the event of a disputed charge or billing error, the department must immediately notify Bank of America (866-500-8262).

### REQUIRED DOCUMENTATION

Documentation of expenses must be clear and match each charge on the statement from Bank of America.

- Receipts from merchants showing items purchased OR
- Shipping label - providing the items and cost which total the amount charged OR
- A copy of order form – which displays cost of item(s), vendor and total charged.

### SALES TAX

- The proof of items purchased – itemize the charges and clearly indicate the amount of sales tax assessed.
- If sales/use tax is not assessed by a non-South Carolina vendor, the department (liaison) must enter/list Use Tax depending on the county where the cardholder is located.

### INADEQUATE DOCUMENTATION

Card privileges can be discontinued for improper documentation of purchasing transactions.

### TIMELY REPORTING

If a department fails, for any reason, to return the distribution of charges to your liaison within 20 days after posting a default account number can be charged without notice.

### PROCUREMENT VIOLATION

If a VISA Purchasing Card is found in violation of the State's or University's procurement policy, the card may be immediately deactivated and the department must return the card to the University Card Administrator.

### \$2,500 PER TRANSACTION LIMIT

The University Purchasing Card will by default be limited to single purchases not exceeding \$2,500. If your spending patterns require an exception to this limit, please email Program Administrator with necessary details at [crawfo5@clermson.edu](mailto:crawfo5@clermson.edu) with the required information.

### CARDHOLDER APPROVAL

I have read, understand, and agree to the terms and to the agreement governing the use of the Bank of America VISA Purchasing Card. In addition, I understand misuse or abuse of my card or willful violation of the terms of the terms of this Agreement may result in disciplinary action against me. Approval of this agreement indicates your understanding that the approval and proper distribution of charges will be done within 20 days. Failure to meet the deadline can jeopardize your ability to remain a card user.

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**REQUIRED CARDHOLDER SIGNATURE & PRINTED NAME**

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**DATE SIGNED**