Policy Handbook: P-Card Policy

Below are the positions within the School of Education and Human Services to be P-Card holders, as determined by Dean:

Department Chairs
NCATE Director
Unit Accountant/Budget Director
Departmental Business Administrators

**New Card Holders:** The following steps are required to become P-Card holder for SEHS.

- Complete the on-line training.
  - Please see [http://finance.umich.edu/procurement/training/pcardtraining](http://finance.umich.edu/procurement/training/pcardtraining) for required P-Card Holder training.

- Complete Application
  - Obtain the P-Card Application, instructions, and Cardholder Agreement form from the Procurement Services web site: [http://finance.umich.edu/procurement/forms/pcardapplication](http://finance.umich.edu/procurement/forms/pcardapplication).
  - Sign the P-Card Application. Read and sign the P-Card Cardholder Agreement once fully understood and agreed to. The applicant must initial the summary information at the top of the form, and sign the bottom of the form after reading the terms and conditions.
  - Submit the completed application and signed Cardholder Agreement form to the Accountant for processing.

**Changes to P-Card Profile:** To make changes to your existing P-Card profile, please complete the relevant section(s) of the P-Card Maintenance Form. The P-Card Maintenance Form can be found at: [http://finance.umich.edu/procurement/forms/pcardmaintenance](http://finance.umich.edu/procurement/forms/pcardmaintenance). Submit the completed P-card maintenance form to the Accountant for processing. For changes to cardholders address, also submit the HRRIS change of address form which can be found at [http://hr.umich.edu/hrris/forms/individuals.html](http://hr.umich.edu/hrris/forms/individuals.html), and then select Address/Personal Data Form.

**P-Card Limit Changes/ ATM Capability:** Complete the relevant section(s) of the P-Card Limit Change Form to request change(s) in the monthly credit limit. Complete the form for ATM capability also *(Only available for international travel)*. The P-Card Limit Change From can be found at: [http://finance.umich.edu/procurement/forms/pcard-limit-change-form](http://finance.umich.edu/procurement/forms/pcard-limit-change-form). Submit the completed P-card limit change form to the Accountant for processing.

Note: A clear business purpose must be provided for a request to increase the monthly credit limit.
**Closing/Suspending:** For card holders going on an extended leave of absence, the Dean’s office will submit a P-Card Maintenance Form to the P-Card Office to temporarily suspend the card. For card holders transferring to another department or unit within the University, please return the SEHS provided P-Card to the Dean’s office for termination and destruction.

**Lost or Stolen Cards:** Please following the following steps in the event the P-card is Lost/Stolen.

- Contact the P-Card vendor (currently JP Morgan Chase) to report a lost or stolen card, or if fraudulent activity is discovered.
  - JP Morgan Chase Services can be reached at 1-800-270-7760 or 1-847-488-3748 outside the US.
- Notify DPS if necessary.
  - DPS can be reached at (734) 763-1131
- Monitor activity in Concur to ensure no charges have been processed after the card has been cancelled.
- Contact JP Morgan if activity occurs.