

Instructions: All Yale Purchasing Card (“PCard”) cardholders must complete the PCard training and consent to the terms and conditions of this agreement before receiving a PCard. Cardholders may obtain the PCard training materials via Yale’s online [Training Management System](#) (“TMS”). Cardholders may also record their consent to this agreement via TMS. Cardholders should not submit paper copies of this agreement.

As an approved cardholder of a Yale Purchasing Card (“PCard”):

I acknowledge that I have:

- Received, reviewed, and have understood the PCard training materials; and
- Reviewed and have understood [Policy 3215 Yale Purchasing Card](#).

I agree to comply with the following:

- All purchases made with a PCard must comply with all applicable laws, regulations, and sponsor requirements, if applicable;
- All purchases made with a PCard must comply with the requirements of [Policy 3215 Yale Purchasing Card](#) and the requirements of all other applicable and University policies and procedures, as set forth under the [Related Information](#) section;
- All cardholders must use discretion and good judgment when making purchases and/or incurring expenses, and must only use PCards for University business;
- All cardholders must provide documentation supporting the business purpose of PCard charges, as detailed in [Procedure 3215 PR.02 Yale Expense Management \(PCard and Out-of-Pocket Expenses\)](#);
- All cardholders must only make PCard purchases within their [dollar and transaction limits](#);
- All purchases made with a PCard must comply with the [Permitted Commodities](#) (e.g. travel, entertainment, small dollar supplies) and [Prohibited Commodities](#) (e.g. gift cards, cash advances, traveler’s checks) lists maintained in [Procedure 3215 PR.01 Yale Purchasing Card Procedure](#), unless the cardholder receives prior approval from the Controller’s Office;
- All cardholders must immediately notify Yale Shared Services (“YSS”) or the issuing bank if their PCard is lost or stolen;
- All cardholders are expected to prepare and submit expense reports for PCard transactions, with supporting documentation, within thirty (30) days from the date the expense is incurred, as described in [Procedure 3215 PR.01 Yale Purchasing Card Procedure, Section 4](#);
- All cardholders must not electronically store their PCard number with any online suppliers (e.g., Amazon), to minimize the risks associated with potential vendor data breaches;
- All cardholders must not use a PCard to make a purchase from a Supplier if they have, or a member of their immediate family or partner has:
 - a family relationship or business affiliation with the Supplier; or
 - a financial or other interest in, or a tangible personal benefit from, a PCard transaction with that Supplier;Such an action may be considered a Procurement Conflict of Interest. All PCard purchases must comply with the University’s statement on [Procurement Conflicts of Interest](#), as fully described in [Policy 3201 General Purchasing](#);
- All cardholders must not share their PCard account information with anyone else;
- All cardholders must not use their PCard to make purchases from or issue payments to any individuals or companies in an embargoed country (current embargoed countries/regions are: Cuba, Iran, North Korea, Syria, and the Crimea, Luhansk, and Donetsk regions of Ukraine/Russia), unless they receive prior approval from the Director, [Export Controls](#). Please note, even when pre-approval is obtained from the Director, Export Controls, a PCard may not be accepted in embargoed countries;
- All cardholders must not claim reimbursement by another means (e.g., petty cash, check reimbursement, or treasury services) for any charges expensed to a PCard; and
- All cardholders must not split transactions in an attempt to circumvent single purchase dollar limits. For appropriate purchases, cardholders may obtain temporary approval to raise single purchase dollar limits. See [Procedure 3215 PR.01 Yale Purchasing Card Procedure, Section 3](#).

I understand that:

- Yale University may terminate my privilege to use a Yale PCard at any time, for any reason. If Yale suspends, cancels, or otherwise terminates my privilege to use a Yale PCard, I agree to return to Yale the PCard issued to me immediately upon request; and
- Improper use of the PCard issued to me may result in disciplinary action, up to and including termination of my employment.