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 below 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;
- 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. For expenses incurred during business travel, cardholders are expected to prepare and submit expense reports, with supporting documentation, within ten (10) days from the end of travel, 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 region of Ukraine/Russia), unless they receive prior approval from the Director, Export Control Licensing. Please note, even when pre-approval is obtained from the Director, Export Control Licensing, 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.

- Questions? Contact purchasing.card@yale.edu -