

## Yale University Purchasing Cardholder Agreement

As the holder of this Yale Purchasing Card (PCard):

### I acknowledge:

- That I have reviewed the PCard training presentation and have addressed any questions to my business office for clarification.
- That I will read the following documents and ask questions if I do not understand the contents:
  - Yale Purchasing Card Procedure 3215: <http://policy.yale.edu/procedure/3215-pr01-purchasing-cards-and-expense-management-system>
  - Traveling on University Business Policy 3301: <http://policy.yale.edu/policy/3301-travel-university-business>
  - Business Meals and Entertainment Policy 3302: <http://policy.yale.edu/policy/3302-business-meals-entertainment-and-other-social-events>

### I agree:

- To immediately notify JP Morgan Chase (Bank One), my business office and the Yale University Purchasing Card Office if my PCard is lost or stolen.
- To comply with the terms and conditions of this Agreement and the provisions of the following documents:
  - Yale Purchasing Card Procedure 3215: <http://policy.yale.edu/procedure/3215-pr01-purchasing-cards-and-expense-management-system>
  - Traveling on University Business Policy 3301: <http://policy.yale.edu/policy/3301-travel-university-business>
  - Business Meals and Entertainment Policy: 3302 <http://policy.yale.edu/policy/3302-business-meals-entertainment-and-other-social-events>
- Not to use my PCard to obtain the restricted commodities listed in the Purchasing Card Program Policy: <http://policy.yale.edu/policy/3220-purchase-restricted-items>
- To accept responsibility for the proper protection and use of my PCard, as outlined in the Agreement and the Presentation.
- To use this card for official University purchases only.

- That none of these charges are being claimed for reimbursement from Yale through another means or from another source.
- To provide documentation, when required, supporting the legitimate business purpose of all charges.
- To prepare my expense reports within 10 days of returning from a trip or, in the case of services and supplies expenses, weekly at a minimum.
- That my PCard will be shut off if I have unprocessed transactions older than 45 days.
- If unprocessed transactions initiated by me are older than 60 days (versus initiated for other faculty, staff and students), such transactions will be treated as advances and deducted from my pay, but only after I am notified in writing and am granted a reasonable period of time to resolve the issue.
- That transactions initiated on behalf of other faculty, staff and students older than 60 days will be charged to a department General Appropriations account and will have to be resolved through the department.
- Not to charge personal purchases, except for any incidental personal expenses related to travel only (e.g. in house movies, mini bar charges) and that and such expenses can be deducted from my pay.
- All expenses incurred through the use of my PCard will comply with all of the University's policies and procedures.
- That any outstanding cash advances can be deducted from all amounts due to me or, if older than 30 days, deducted from my pay.
- Not to use my PCard for purchases from or payments to any individuals or companies in an embargoed country (Myanmar, Sudan, Syria, Iran, Cuba, and North Korea) until I have received approval from the Department of Export Control Licensing.

**I understand:**

- That Yale University may terminate my right to use this PCard at any time for any reason, and I agree to return my PCard to Yale University immediately upon request or upon termination of employment.
- That improper use of my PCard may result in disciplinary action, up to and including termination of my employment.

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