



Complete this form and submit a signed copy of the form to the [P-Card Request Dropbox Submission](#) page. TAP Accounting will then obtain the Controller's signature and e-mail a completely executed version of the form to you. Please e-mail [AuxiliaryPartners.AP@csudh.edu](mailto:AuxiliaryPartners.AP@csudh.edu) for any questions. For **New Card Requests**: The cardholder, supervisor, and delegate are required to attend TAP P-Card training and have Finance Enterprise login credentials prior to submission of this form.

**Action Requested:**  New Card  Replacement  Credit Limit Increase  Change of Supervisor / Delegate

**Credit Limit:**  \$1,000  \$5,000  Other Amount: \_\_\_\_\_

**Rationale for Other Amount or Credit Limit Increase:**

**Credit Limit Increase Only:** Current Credit Limit: \_\_\_\_\_ Requested Credit Limit: \_\_\_\_\_

**Length of Increase:**  Permanent  Temporary (date effective until \_\_\_\_\_ )

**Personal Information**

\_\_\_\_\_  
Last Name First Name Work Phone Cell/Home Phone

\_\_\_\_\_  
Work Email Department and Division

\_\_\_\_\_  
Supervisor Name Supervisor Email TAP Account Number

I have read, understand, and agree to the Purchasing Card Policy. I understand that possessing and using a Purchasing Card is a privilege and never a right. Failure to use my card at all times in accordance with the Toro Auxiliary Partners' policies and procedures may result in lost card privileges, disciplinary action, or both.

\_\_\_\_\_  
Cardholder Signature Date

\_\_\_\_\_  
Supervisor Signature Date

*The cardholder has the option to assign a delegate to receive P-Card transaction emails and submit on their behalf (example: a director may request their assistant to be a delegate).*

\_\_\_\_\_  
Delegate Name Delegate Email

**ACCOUNTING USE ONLY**

\_\_\_\_\_  
TAP Controller Signature Date

\_\_\_\_\_  
P-Card Training Date UserID

\_\_\_\_\_  
Supervisor UserID Delegate UserID Account Balance

## Instruction for Purchasing Card (P-Card) Request Form Submission

### 1. Form Completion:

- A. Action Requested: Select the appropriate action you are requesting by checking the box for:
  - a. New Card
  - b. Replacement
  - c. Credit Limit Increase
  - d. Change of Supervisor / Delegate
- B. Credit Limit: Select the desired credit limit from the options provided (\$1,000, \$5,000, or Other).
- C. If selecting "Other," specify the Amount in the space provided and include a Rationale for Other Amount or Credit Limit Increase.

### 2. Credit Limit Increase Requests (If Applicable):

- A. Provide the Current Credit Limit and the Requested Credit Limit.
- B. Indicate whether the increase is Permanent or Temporary. If temporary, specify the effective until date.

### 3. Personal Information: Fill in your Name (Last Name, First Name), Work Phone, Cell/Home Phone, Work Email, Department and Division, Supervisor Name, Supervisor Email, TAP Account Number

- A. Ensure all information is accurate and up-to-date.
- B. It is recommended to list the primary account number first if the P-Card will be used for multiple account numbers, as this will be the default account number in Finance Enterprise.

### 4. Agreement and Signatures:

- A. Read and acknowledge the statement confirming that you have read, understand, and agree to the Purchasing Card (P-Card) Policy and P-Card User Guide available at <https://www.csudhauxiliarypartners.org/post/finance-policies>.
- B. Sign and date the form as the Cardholder. Ensure that your Supervisor also signs and dates the form.

### 5. Supervisor / Delegate Information

- A. If you wish to assign a delegate to manage P-card transactions on your behalf, provide the Delegate's Name and Delegate Email.
- B. If you need to change / update your supervisor, check the "Change Delegate / Supervisor" box and enter the information under the Personal Information section.

### 6. Submission Process:

- A. After completing and signing the form, submit a signed copy to the [P-Card Request Dropbox Submission](#) page.
- B. TAP Accounting will then obtain the Controller's signature and email the fully executed version of the form back to you.

### 7. Training Requirement for New Card Requests:

- A. If requesting a new card, ensure that the Cardholder, Supervisor, and Delegate (if applicable) have completed TAP P-Card training and have Finance Enterprise login credentials before submitting the form.

### 8. Questions and Assistance:

- A. If you have any questions or require assistance, please contact TAP Accounting via email at [auxiliarypartners.ap@csudh.edu](mailto:auxiliarypartners.ap@csudh.edu).

Ensure that all required fields are completed and that the form is signed before submission to avoid any delays in processing your request.