

Indiana University Office of Procurement Services

STANDARD OPERATING PROCEDURE

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| SOP NO: | SOP-PCARD-02 |
| SUBJECT: | Obtaining a P-Card |
| SOURCE: | University Procurement Services |
| ORIGINAL DATE OF ISSUE: | |
| DATE OF LAST REVISION: | 02/26/2024 |
| DISCLAIMER: | The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances. |
| RATIONALE: | To provide Indiana University employees instructions for obtaining a P-Card. |
| PROCEDURES | <p>Steps in the Process</p> <ol style="list-style-type: none"> 1. Proposed cardholder completes <i>P-Card Essentials</i> training requirement. 2. Department staff member submits the Online Procurement Card Application. 3. Card application reviewed/approved by fiscal officer. 4. Training compliance confirmed and card application reviewed by Card Services. 5. Card requested from US Bank by Card Services. 6. Card received and activated by cardholder. 7. Cardholder establishes US Bank credentials for online account access. <p><u>Training Requirement</u> The proposed responsible cardholder must complete the <i>P-Card Essentials</i> training requirement as described on the course enrollment page. If a compliant cardholder applies for multiple P-Card accounts, training only needs to be completed once.</p> <p><u>Application Process and Review</u> An electronic cardholder agreement/application form must be completed by an Indiana University (IU) employee.</p> <p>After submission, the application routes the fiscal officer of the funding account specified on the application. Assuming the application is approved by the fiscal officer, it routes to Card Services. Card Services verifies the proposed cardholder has met the training requirement, reviews the application, and if appropriate, approves the application.</p> <p><u>Card Account Setup</u> P-Cards are requested from US Bank by Card Services staff. Cards are mailed 7-10 business days after they are requested from US Bank. Requests may be expedited for an additional fee. Contact Card Services via the Support Form if this is needed.</p> <p><u>Card Activation</u> The P-Card must be activated by the responsible cardholder prior to use. Instructions for card activation are provided on the card itself. Collect the following information to activate the card:</p> <ul style="list-style-type: none"> • 16-digit account number (the card number) • ZIP code of billing address (defined on card application) • Business telephone number (defined on card application) • Four-digit activation code (P-Cards: 9999, Meeting Cards: 0000) <p><u>Establish US Bank Online Account Access</u></p> |

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| | <p>US Bank offers online access that provides the ability to check card available balance, view recent transactions, print statements, and more.</p> <p>A US Bank Access Online User Profile can be associated with multiple cards. Review the US Bank Online Account Creation Steps to learn how to establish Profile. To add a new P-Card account to an existing US Bank Online Profile, contact Card Services via the Support Form.</p> |
| CROSS REFERENCE | <ul style="list-style-type: none">• Online Procurement Card Application• P-Card and Meeting Card Application Process (video)• P-Card Essentials enrollment via IU Expand• Card Activation Steps• US Bank Online Account Access• US Bank Online Account Access Creation Steps |