

## P–Card Authorization Request Form

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### PROCEDURE

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When the College agrees to accept the Terms and Conditions of a sponsored project, the Institution assumes significant legal and financial obligations. Therefore, it is imperative that the College foster a culture of fiduciary compliance for all sponsored projects (Policy 1.111).

The Office of Grants and Contracts (OGC) oversees and monitors all sponsored projects awarded to the College and interfaces with the applicable Principal Investigator (PI) (or Project Director [PD]), Vice President for Finance and Administration (VPFA), Budget Office, and Controller’s Office to ensure award compliance (Policy 1.111).

The Lewis-Clark State College (LC State) purchasing card (P-Card) program, was designed to streamline and simplify the purchasing process for relatively small dollar items (under \$2,000). The P-Card program is designed to provide operational efficiency without sacrificing necessary fiduciary controls.

A PI should complete the P-Card Authorization Request Form and e-mail it to the OGC for review and approval prior to any sponsored project related expense being charged to a P-Card.

The OGC will vet/assess the P-Card request and identify any concerns and/or pose any questions to the PI that the OGC may have regarding the request. The concerns and questions of the OGC will need to be sufficiently addressed before a formal Approval of Purchase is granted to the PI.

P-Card approval requests may require additional approvals from other College entities depending on the project scope, budget, and other purchase requirements. The OGC will try to complete P-Card requests within five (5) business days of receipt.

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## INSTRUCTIONS

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**Download** this form to your desktop **and** open the form in **ADOBE PDF** before starting. **This form will NOT work correctly in your web-browser.**



Make sure the 'Show border hover color for fields' in Adobe PDF is 'checked'. You will only need to complete this requirement if you have altered the default settings of Adobe PDF on your computer.

**1 2 3**

**Please complete each question in the order it appears on this form.** Some of the items on this form are dependent upon the answers to previous questions.



Mandatory fields and Mandatory Requirements on this form are highlighted in '**RED**'.



Use the '**GREY**' buttons to attach all required and / or additional documents to this form. **Each attachment should be easily identifiable by name and should be attached as a separate PDF (i.e., Do not combine all attachments into one PDF).**



Information icons have '**GREEN**' borders and '**BLUE**' circles.



Use the 'Save' icon to save the form as a fillable PDF file. **Please do not 'Print to PDF' or scan a hard copy of this form.**



Use a **Digital Id Signature** when signing this Form.



Click the '**YELLOW**' button to pause routing of this document, and identify any modifications that may be needed.



Click the '**GREEN**' button to send this document to the next reviewer.

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## P-CARD REQUEST

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### **BASIC INFORMATION**

1. Name of Award:
2. Investigator Name:
3. Account Number:
4. OGC Tracking Number:
5. Anticipated (or Actual) Date of Purchase:

### **PURCHASE INFORMATION**

6. Have any of the items listed on this P-Card request been purchased prior to obtaining a formal Approval of Purchase from the OGC?  
NO  
YES: Please identify the items and explain.
  
7. Are each of the items on this P-Card request 'Allowable', 'Allocable' and 'Reasonable' expenses for the identified award/contract?  
NO  
YES
  
8. Will approval of this P-Card request result in an over-expenditure of any budget category within the LC State account identified for this sponsored project?  
NO  
YES: Please estimate the amount of over-expenditure and explain.

9. Purchase Request

<b>Purchase Request</b>			<b>Unit</b>	<b>Number</b>	<b>Line</b>	<b>OGC</b>	
<b>#</b>	<b>Items</b>	<b>Vendor</b>	<b>Cost</b>	<b>of Units</b>	<b>Total</b>	<b>Approval</b>	<b>OGC Note(s)</b>
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
					<b>Subtotal:</b>		
					<b>Approved Subtotal:</b>		

**ROUTING & APPROVALS**

**Note:** The preparer of this document is responsible for identifying all needed e-mail address. Please do not 'Print to PDF' or send a scanned copy of this form for signature routing.

10. Is someone other than the Principal Investigator or Cardholder preparing this form (e.g., administrative assistant, etc.)?

- NO
- YES

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Signatory/Approver	LC State e-mail	Digital ID Signature	Action	
			Modify	Approve
Administrative Assistant, etc.:				
PI or PD				
Cardholder:				

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**GRANTS AND CONTRACTS OFFICE USE ONLY**

Date Received:

Received By:

Unique ID:

Date      Account      Number      Purchase ID

**Action**

Approve

Modifications Needed for Approval

Explanation:

Notes:

Action taken by:

File Name: