FOR NEW ACCOUNTS:

1) Use capitalization for all input (except email addresses).
2) DO NOT use hyphens in the Default Account Number fields.
3) DO NOT use commas or decimals in the Cycle Spending Limit or Single Purchase Limit fields.
4) All fields MUST be completed in the Cardholder Information and Approving Official sections.
5) 5-3 accounts cannot be used as a default. Use another departmental account and reallocate back to the 5-3 account.
   **Exception:** A 5-3 account MAY be approved as a default for a PI who has ONLY a 5-3 to charge. Requests for this exception will be reviewed by Sponsored Programs on a case-by-case basis. Please complete the PCard Approval Request for 5-3 Account as Default form and forward it to: Office of Sponsored Programs, 2002 Campus Delivery.
   One form per Cardholder please.
6) Check the appropriate box in the Business Need Justification section.
7) Obtain Approving Official and Department Head* or Director* signature and forward the original to Procurement Services.
   *Dean or VP if applicant is a Department Head or Director
8) Complete Official Function Status section **ONLY** if official function status is requested for the Cardholder and obtain appropriate signatures for the type of Cardholder access being requested.

FOR ACCOUNT CHANGES:

1) Check the Change box and input the Cardholder Account Number, Cardholder Name and CSU Employee ID number.
2) Input only those fields that pertain to the change (follow the guidelines listed above).
3) Obtain Approver signature and forward the original to Procurement Services.

TO DELETE A CARDHOLDER ACCOUNT:

1) Check the Delete box and input the Cardholder Account Number, Cardholder Name and CSU Employee ID number.
2) Obtain Approver signature and forward the original to Procurement Services.