



State University of New York College of  
Environmental Science and Forestry

## Research Procurement Card Application

### I. Cardholder Information

**Name on Card (Print):** \_\_\_\_\_ **Title:** \_\_\_\_\_  
*(Individual who will do the purchasing with the card)*

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Department Name:** \_\_\_\_\_ **Work Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Work Phone Number:** \_\_\_\_\_

**PI Name:** \_\_\_\_\_

### II. Account Information

- Maximum single transaction limit: \$2,500
- Maximum total monthly limit: \$5,000

#### Default Project-Task-Award Account

Project: \_\_\_\_\_ Task: \_\_\_\_\_ Award: \_\_\_\_\_

#### Department Project-Task-Award Backstop Account

*This should be a non-sponsored account with "unrestricted" terms. Ex: Department Chair's research incentive account.*

*Why is this required? If expenses are charged on the PCard and cannot be reconciled to a sponsored account, we will use the backstop account to charge/writeoff the expenses.*

Project: \_\_\_\_\_ Task: \_\_\_\_\_ Award: \_\_\_\_\_

**Important Note:** Expenditures purchased with the RF PCard during the last 60 days of the grant will **not** be approved for payment against the grant. They will be charged to the Chair backstop account noted above. If purchases must be made during the last 60 days, they should go through the purchasing office for proper approvals in advance of the purchase and include an appropriate justification.

### III. Approvals

**Department Chair Name (Print):** \_\_\_\_\_ **Signature:** \_\_\_\_\_

**Operations Manager (Print):** \_\_\_\_\_ **Signature:** \_\_\_\_\_

Application will not be processed without a signed Approving Official Agreement (see page 2)  
Submit page 1 and 2 together. Incomplete or illegible applications will be returned

Cardholder Applicant Name: \_\_\_\_\_

### III. Authorization

#### APPROVING OFFICIAL AGREEMENT

#### SUNY College of Environmental Science and Forestry Research Foundation Procurement Card Agreement

Your use of an RF Procurement Card is subject to the following terms and conditions:

1. You are being entrusted with a valuable tool – a Bank of America Purchasing Card - which is to be used for Research Foundation purchases of services and commodities. Because you will be making a financial commitment on behalf of the Research Foundation, you must strive to obtain best value for the Research Foundation by following established purchasing policies as appropriate. You are also responsible for ensuring that: all purchases are allowable, allocable, and reasonable costs for the awards to which you intend to charge these purchases; that there are sufficient funds available to cover the purchases; and that the purchases take place within the approved award time period. Any business costs deemed non-chargeable to a sponsored account will be charged to the backstop account you provided on page 1.
2. All charges made to your credit card will be posted to a central bill by Bank of America and sent to the SUNY-ESF RF PCard Program Administrator for payment. Cardholders will be responsible for pulling and reviewing their monthly statements online via the Bank of America Global Card Access platform, for reconciliation purposes only. Cardholders must also complete a monthly reconciliation summary form, attach receipts, obtain Principal Investigator signature(s), and submit to the Purchasing Office by the established deadline (10 business days). It is important that you submit your monthly reconciliation promptly in order for all charges to be reconciled against the central account. **Failure to submit your voucher in a timely manner (10 business days) may result in revocation of your Purchasing card.** In addition, all unreconciled costs will be automatically charged to the backstop account you provided on page 1.
3. **You may use the purchasing card for authorized Research Foundation business transactions only. You may not use this credit card for personal charges or travel/entertainment expenses. You cannot reconcile charges to a NYS or College Foundation account.** The RF and the college will audit the use of your card and take appropriate action on any discrepancies or unauthorized charges. All charges must comply with sponsor regulations. Any evidence that your card has been used fraudulently will require an investigation and administrative actions appropriate to the situation will result, up to and including criminal prosecution.
4. This is a tax exempt card and should be used with the tax exempt certificate. If tax has been charged to the RF Bank of America Purchasing Card, the end user must contact the vendor for a credit, or reimburse the RF for any sales tax charged to the card. This card is tax exempt in the following states: NY, FL, NJ, CA, KY, MA, PA, TN, TX.
5. The RF Bank of America Purchasing Card is property of the Research Foundation. You must return your card immediately upon request or upon termination of employment or retirement. Should there be any change in your employment status you must return this card and arrange to have a new card issued, if necessary.
6. If this credit card is lost or stolen, you must notify the SUNY-ESF Purchasing Office immediately.
7. You must comply with any changes to the terms and conditions or policies and procedures concerning use of this credit card.

**As the employee receiving this card, I have read and understand these terms and conditions associated with the use of this card.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Submit page 1 and 2 together. Incomplete or illegible applications will be returned.