



| POLICY NAME | PCARD REGULATION |
|--------------------|-------------------------|
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Developed jointly by: Procurement Services and Financial Services
In Collaboration with: Internal Audit Department and Legal Services
Approved by: Vice-President – Administration and Finance

PURPOSE AND SCOPE

The PCard Regulation has been approved and issued under the authority of the McGill University Procurement Policy.

The McGill University PCard is a credit card selected by the University and is assigned to authorized McGill Employees in order to make purchases of goods and services.

For the purposes of the Regulation, McGill “Employees” collectively refers to Academics, Researchers, and Administrative Staff of the University.

Refer to the **PCard Procedures** for details regarding the implementation and interpretation of this Regulation.

REGULATION

R1. General

- R1.1.** The PCard is to be used to make purchases of goods and services when a supplier is not an enabled eCatalog supplier on McGill MarketPlace (MMP). Enabled e-Catalog suppliers on MMP are defined as: Hosted Catalog Suppliers, Punch Out Vendors and University Managed Catalog Vendors.
- R1.2.** Some suppliers are enabled eCatalog supplier on MMP but only accept payments by credit card. In these situations, the purchase can be charged on the Procurement Services PCard.
- R1.3.** The chip-enabled PCard includes both the Cardholder and McGill University names. No individual other than the named, authorized McGill Employee is permitted to use the PCard.
- R1.4.** The PCard must only be used to make purchases of goods and services that are legitimate, appropriate, reasonable and in accordance with the McGill Procurement Policy, the PCard Regulation, and Granting Agency Guidelines. For the purpose of the PCard Regulation, these will be collectively referred to as “the Policies”.
- R1.5.** Failure to comply with the Policies will result in **cancellation of the PCard** and may result in disciplinary and other measures taken against the Cardholder. The University will hold the Cardholder fully responsible for all unauthorized purchases and any other fees associated with those purchase(s).
- R1.6.** Central PCard Administration (Transaction Services, Financial Services) has the authority to **cancel PCards** without advance notice should it have cause to believe that the PCard is not being used in full compliance with the Policies or if it otherwise contravenes any of the University’s obligations towards the Card Issuer (i.e. the Financial Institution/Bank).
- R1.7.** When a PCard is cancelled by Central PCard Admin, the Cardholder cannot apply for a new PCard for a period of 1 year.

Central PCard Admin will advise the Cardholder and the Faculty Financial Officer/Central Admin Finance Contact via email once the PCard has been cancelled.

R2. PCard Limits

McGill University PCard limits are set as per the following parameters:

- R2.1. **Purchase Limit:** Single Transaction not to exceed \$5,000 CDN (including shipping charges, currency exchange and taxes).
- R2.2. **Monthly Limit:** \$15,000 CDN total purchases/month. This limit can be lowered.

R3. PCard with Low Volume of Transactions

- R3.1. Cards that have 5 transactions or less within a 12-month period will be subject to **cancellation** following review and analysis by Financial and Procurement Services.

R4. Purchase Splitting

- R4.1. It is strictly prohibited to split purchases to circumvent PCard limits.
- R4.2. The complete purchase must appear as a single transaction record to be compliant.
- R4.3. If the dollar amount of a purchase exceeds the established PCard limits, a purchase order must be issued through MMP or a Procurement Services PCard purchasing request can be made.
- R4.4. PCards will be **cancelled** immediately if purchase splitting occurs.

R5. Cardholder Responsibilities

- R5.1. The Cardholder is a McGill Employee who is authorized by the Fund Financial Manager (FFM)/Delegate of the Default FOAPAL to receive a PCard for making purchases as per the Policies.

The FFM/Delegate may also be a Cardholder in which case authorization of one-up is required for receiving a PCard

- R5.2. Owning a University PCard does not affect the Cardholder's personal credit.
- R5.3. The cardholder is forbidden to email their credit card number to PCard Administration, to any supplier or Staff member as it can easily be intercepted.

Failure to comply with this clause will result in automatic **cancellation** of the PCard.

R5.4. PCards are assigned to a specific individual. They may not be assigned to multiple users. PCards may not be loaned to any other individual (i.e. card sharing is not permitted). The Cardholder is the only person authorized to use the assigned PCard. The Cardholder may effect purchases on behalf of other Employees but remains responsible for all Transactions charged to their PCard.

Failure to comply with this clause will result in automatic **cancellation** of the PCard

R5.5. Cardholders are responsible to secure the PCard and all information relating to the PCard:

- Personal Account Number (PAN): the number on the face of the card
- Card Verification Value (CVV): the 3 digits on the back of the card
- Expiration date
- Personal Information Number (PIN): the number entered when making card present/in-store purchases

R5.6. The Cardholder is responsible for notifying the card issuer and Central PCard Admin when the card is lost or stolen

R5.7. The Cardholder can appoint a Departmental PCard Reconciler.

R5.8. In the event of an Internal or External Audit, the Cardholder, along with the FFM/Delegate are the primary contacts.

R6. The Default FOAPAL

R6.1. The Default FOAPAL (Fund provided by the Cardholder and approved by the FFM/Delegate at the time of the PCard application) will automatically be used by MOPS to distribute any un-reconciled or un-approved PCard Transactions following the designated reconciliation/approval deadlines.

The Default FOAPAL must be active and valid at all times. Failure or inability to provide a new fund number within one month after the termination date will result in cancellation of Pcard.

The account code used will be a Suspense PCard Transactions Account Code – 700490.

R6.2. Restrictions on the Default FOAPAL:

- Tri-Agency Grants cannot be assigned as the Default FOAPAL.
- The Provost' Office will review all PCard Applications where the Default FOAPAL is an Internal Chair Award such as James McGill Professorship Awards, William Dawson Scholarship Awards, Distinguished James McGill Professorships, Endowed Chairs and Endowed Professorships.

R7. McGill Online PCard System (Minerva Menu - MOPS)

- R7.1.** PCard Transactions are generally uploaded from the credit card issuer's system daily to MOPS by Central PCard Admin.
- R7.2.** MOPS is to be used to reconcile and to approve PCard Transactions. Once approved, PCard Transactions post to Banner FIS.

R8. Reconciling PCard Transactions

- R8.1.** The Cardholder can reconcile PCard Transactions to the appropriate fund(s) or can assign a delegate to reconcile PCard Transactions.
- R8.2.** For the purpose of this Regulation, the delegate will be referred to as the Departmental PCard Reconciler since they can be assigned to reconcile PCard Transactions for more than one PCard.
- R8.3.** To ensure Segregation of Duties, the Reconciler (whether the Cardholder or the Departmental Reconciler) must not reconcile PCard Transactions on funds where they are named as the FFM/Delegate.

Failure to comply with this clause, will result in automatic **cancellation** of the PCard.

- R8.4.** For Research Grants and Contracts (2F/2M fund types):
- An Institutional Representative other than the Principal Investigator/Delegate should review the PCard Transactions. It is recommended that the Financial Services Team Manager (FSTM) be appointed as the Departmental Reconciler.
 - Granting Agencies recommend Institutional Oversight on PCard Transactions charged to Research Grants and Contracts. As such, an Institutional Representative other than the Principal Investigator/Delegate should review PCard Transactions. The Institutional Representative can either be the Financial Services Team Manager (FSTM) or the Central Fund Administrator.
- R8.5.** Reconciliations must be done by the Reconciliation Deadline, otherwise PCard Transactions will be charged to the Default FOAPAL and Suspense PCard Transactions Account Code (this is referred to as an **auto-reconciled PCard Transaction**).

At the third instance of auto-reconciled PCard transactions, the PCard will be automatically **cancelled**. *The period for determining non-compliance is the fiscal year.*

- R8.6.** Reconcilers must upload the proof of purchase (and other supporting documentation if applicable) for each PCard Transaction prior to submitting the PCard Transaction for approval.

Proof of purchase refers exclusively to invoices, receipts and credit memos. Proof of purchase must include name of supplier, full description of what was purchased and amount. Emails, quotations, and PO's are not proof of purchase.

Failure to comply with this will result in automatic **cancellation** of the PCard.

Please note: an automated control was implemented on December 7th, 2022. Please refer to the [announcement](#).

- R8.7.** Supporting documentation/receipts must be digitized and uploaded at the time of reconciliation. Please refer to the [Digitization Guidelines](#). Once the PCard transaction has been approved and has posted to Banner FIS, the PCard supporting documents must be destroyed (unless Central PCard Admin has [communicated](#) otherwise).

The official PCard supporting documentation that will be made available for internal or external audits are the supporting documentation/receipts that have been digitized and uploaded at the time of reconciliation.

- R8.8.** For in-store purchases where a paper receipt is provided by the merchant and the paper receipt must be kept for exchange if defective, or warranty repair/replacement, then the paper receipt should be retained.

R9. Approving PCard Transactions

R9.1. PCard Transactions must be approved by the FFM or their Delegate by the Approval deadline. When they are not approved by the Approval deadlines, PCard Transactions will automatically be charged to the Default FOAPAL – Suspense PCard Transactions Account Code (this is referred to as **an auto-approved transaction**).

Note: The Delegate is assigned by the FFM on their funds in the Minerva Menu – Delegate Approvals of Purchase Requisitions, Change Orders and PCards.

R9.2. To ensure segregation of duties, the FFM/Delegate must not approve PCard Transactions they have reconciled to funds where they are named as the FFM/Delegate.

Since implicit approval is turned on in MOPS, it is at the time of Reconciliation that the FFM/Delegate must not reconcile Transactions on funds where they are named as the FFM/Delegate.

Failure to comply with this clause will result in automatic **cancellation** of the PCard.

R9.3. When approving PCard Transactions, the FFM/Delegate is acknowledging that the PCard Transaction is a legitimate business expense and is in accordance with the Policies.

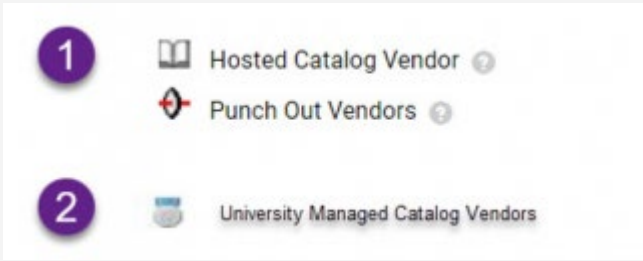
R9.4. In the event of an internal or external audit, the FFM/Delegate, along with the Cardholder are the primary contacts.

R10. Prohibited Transactions

The following transactions are prohibited on PCard (this is not an exhaustive list).

The alternative purchasing method has been included in the table below.

Cardholders will receive one warning (email message) if PCards are used for any of the prohibited transactions. At the 2nd non-compliant occurrence, the PCard will automatically be **cancelled**.

| No. | Prohibited transactions on PCard | Alternative purchasing method |
|-----|---|---|
| 1. | <p>Purchases made from enabled eCatalog suppliers on MMP (i.e. these refer to Hosted Catalog Suppliers, Punch Out Vendors and University Managed Catalog Vendors – see MMP icons below)</p>  <p>Please note: Purchases made via GCI Biobar (formerly GCRC) and the NEB Freezer Biobar are deemed compliant transactions ONLY if the Order Confirmation and the Invoice specifying the name of Biobar are both attached as Supporting Documentation.</p> | <p>MMP</p> <p>Note: If the supplier only accepts payment by credit card, please complete the PCard Purchase Request Form in order for the purchase to be made on the Procurement Services Card.</p> |
| 2. | Alcoholic beverages | Please refer to: McGill Alcohol Permit Procedure |
| 3. | All Gift Cards, Gift Certificates (including but not limited to pre-paid debit/credit cards) and Gifts (including but not limited to chocolate, gift baskets, flowers) | Travel Advance and/or Expense Report |

| No. | Prohibited transactions on PCard | Alternative purchasing method |
|-----|---|--|
| 4. | Laboratory and research animals | MMP Internal Store – McGill Animal Resource Centre |
| 5. | McGill University department/unit that provides services internally and charges the internal departments/units via Inter-Departmental Charges (IDCs)/Feeds (e.g. Facilities Management, Bookstore, Parking Services, Printing Services) | Please refer to each department/units respective processes and forms to request these services |
| 6. | Internal Stores enabled on MMP (example: McGill Animal Resource Centre, Centre for Neurological Disease Models, McGill Computer Store, McGill Dentistry Stockroom, Chemical Engineering, Goodman Cancer Research Centre, Security) | MMP |
| 7. | Salaries | Workday |
| 8. | <p>Travel expenses are prohibited. These must be processed via a Travel Advance and/or Expense Report. Local and virtual conference registrations where no travel expenses will be incurred (e.g. hotel, airfare, rail, meals, etc.) are not considered prohibited transactions since there is no travel involved. Local and virtual conference registrations can therefore be charged on a PCard.</p> <p>Please note that this does not apply to local and virtual conferences that are to be charged on Research Grants and Contracts (2F and 2M fund types). These conference registrations must continue to be processed via a Travel Advance and/or Expense Report.</p> <p>For non-travel expenses it is recommended to use MMP.</p> | Travel and Other Expenses Policy |
| 9. | New Computers, Computer Components and Computer Accessories | Please refer to R11. |

| No. | Prohibited transactions on PCard | Alternative purchasing method |
|-----|---|--|
| 10. | Parts, maintenance services, and fuel for University vehicles | Expense Report, Fleet Card (contact your Fleet Manager) and MMP (with contracted suppliers only) |
| 11. | McGill corporate mobile IT assets (cell phones). | Please refer to: Get a Corporate Mobile Device |
| 12. | Home Internet | N/A |

R11. New Computers, Computer Components and Computer Accessories

R11.1. Refer to the [Memo](#) from the Provost and Executive Vice-President (Academic).

R11.2. For purchases on Research Grants (2F/2M fund types), please refer to the [New Computers, Computer Components and Computer Accessories \(2F/2M\) Chart](#).

R11.3. For purchases on Non-Research Grants (non 2F/2M fund types), please refer to the [New Administrative Desktop and/or Laptop Computers, Academic Laptop Computers and Monitors \(non 2F/2M\) Chart](#)

- A PCard transaction is deemed prohibited if the item has a value greater than \$250.

R12. Cancellation of PCards

PCards will be cancelled for the following reasons:

R12.1. Failure to comply with the McGill Procurement Policy, the PCard Regulation and Granting Agency Guidelines.

R12.2. When Central PCard Admin has cause to believe that the PCard is not being used in full compliance with the Policies or if it otherwise contravenes any of the University's obligations towards the Card Issuer.

R12.3. Cards that have 5 transactions or less within a 12-month period will be subject to **cancellation** following review and analysis by Financial and Procurement Services.

R12.4. When purchase splitting occurs.

R12.5. If the cardholder emails their credit card number to any supplier or staff member.

R12.6. When card sharing occurs.

R12.7. If the Reconciler (Cardholder or Departmental Reconciler) reconciles PCard Transactions on funds where they are named as the FFM/Delegate.

R12.8. At the third instance of auto-reconciled PCard Transactions.

R12.9. When the FFM/Delegate approves PCard Transactions they have reconciled to funds where they are named as the FFM/Delegate.

R12.10. At the 2nd non-compliant occurrence of using the PCard for any of the prohibited purchases.

R12.11. A PCard has not been picked up by the Cardholder within forty-five (45) days following the date of electronic notification from the Central PCard Admin confirming receipt of the PCard.

Please note: When a PCard is cancelled by Central PCard Admin, the Cardholder cannot apply for a new PCard for a period of 1 year.

R13. Lost or Stolen PCards

R13.1. It is the responsibility of the Cardholder to maintain control and security of the PCard. All precautions should be used to maintain confidentiality of all information relating to the PCard, such as the PCard number, Card Verification Value (CVV or 3 digits on the back of the card), expiration date, and Personal Information Number (PIN).

R13.2. If a PCard is lost or stolen, it is the responsibility of the Cardholder to call the Card Issuer and email Central PCard Admin immediately.

R14. Disputes

R14.1. The Cardholder is responsible for resolving all discrepancies and disputes directly with the supplier. Every effort must be made to resolve disputes within thirty (30) days of the transaction. The Cardholder should allow sufficient time for the supplier to issue a credit for the replacement of items.

R14.2. If the Cardholder is not able to resolve the dispute with the supplier within 30 days, the Cardholder must:

- Flag the dispute on MOPS
- Call the Card Issuer
- Send an email to [Central PCard Admin](#)
- Refer to the Procedures for further details

R15. Credits

R15.1. The Cardholder must ensure that the supplier issues a credit to the Cardholder account for any item the supplier has agreed to accept for return or for any agreed upon price adjustment. This credit will appear on MOPS and should be reconciled in the same manner as other Transactions.

R16. Supplier Exceptions

R16.1. Cardholders should contact Procurement Services when encountering suppliers who do not accept PCards.

PROCEDURES

PR1. How to Apply for a PCard

PR1.1. PCard Holders must be McGill Employees.

PR1.2. In order to obtain a PCard:

- a) The employee must read the PCard Regulation;
- b) The [PCard Application Form for Faculties/Admin Units](#) (sign-in is required), must be completed and submitted to the Central PCard Admin.
- c) It takes approximately 20 business days to receive a PCard from the time the PCard Application is received by the [Central PCard Admin](#).
- d) The Cardholder will be notified by email regarding pick-up procedures.

PR2. Using the PCard Securely

PR2.1. It is the responsibility of the Cardholder to **secure the PCard and all information relating to the PCard:**

- Personal Account Number (PAN): the number on the face of the card;
- Card Verification Value (CVV): the 3 digits on the back of the card;
- Expiration date;
- Personal Information Number (PIN): the number entered when making card present/in-store purchases

PR2.1.1. In Store Purchases

In Store is the most secure method of placing orders as the Cardholder must enter their PIN.

PR2.1.2. Purchases made via the Internet

The Cardholder must ensure that secure and encrypted websites are used when placing orders via the internet. For more information please refer to the [IT Knowledge Base](#).

The Cardholder must:

- Obtain electronic confirmation of the order

PR2.1.3. Purchases made by Fax

Whenever possible, prior to making a purchase by Fax, the Cardholder should ensure:

- The merchant's fax machine is in a controlled environment;
- The faxes received by the merchant are secured;
- Once the order processed, the merchant must keep the fax under lock and key or destroy the fax.

The Cardholder must:

- Provide to the supplier, their name, phone number, department name and a shipping address;
- Record the name of the person taking the order;
- Obtain a confirmation order number from the supplier;
- Retain the details of the purchase in a separate file folder to facilitate reconciliation.

PR2.1.4. Purchases made over the Phone

The University strongly urges Cardholders to **not make purchases** over the phone as this has the highest incidence of fraudulent transactions.

If this method of purchasing is the only alternative, then the Cardholder **must place the order in a closed office or area where no other individual can hear and retain the PCard information** (i.e. the PAN, CVV and expiration date).

The Cardholder must:

- Provide to the supplier, their name, phone number, department name and a shipping address;
- Record the name of the person taking the order;
- Obtain a confirmation order number from the supplier;
- Retain the details of the purchase in a separate file folder to facilitate reconciliation.

PR2.2. Before Placing an Order

In all cases, the Cardholder must **determine**, before placing an order that the:

- Proposed purchase is not a prohibited PCard transaction;
- Total cost does not exceed the Cardholder's purchase limits, including shipping charges, currency exchange and taxes;
- Supplier accepts the PCard;
- Product is available;
- Price is the best that can be obtained (ask if educational discounts are available);
- Delivery date meets expectations and needs;
- Appropriate method of shipping and handling is selected and special handling instructions are defined;
- Shipping cost.

PR2.3. Receipt Requirement

In all cases, the Cardholder must **ensure** that that proof of purchase (invoice, receipt or credit memo) contains the:

- Supplier name and address;
- Description of items purchased;
- Quantity of goods ordered and received;
- Itemized unit prices and the amount extensions;
- Goods and Services Tax and Provincial Sales Tax (if applicable);
- Shipping charges (if applicable);
- Grand total of order.

PR3. Disputing a PCard Charge

PR3.1. The Cardholder is responsible for resolving all discrepancies and disputes directly with the supplier. Every effort must be made to resolve disputes within thirty (30) days of the transaction. The Cardholder should allow sufficient time for the supplier to prepare credit voucher or for the replacement of items.

If the Cardholder is not able to resolve the dispute with the supplier within 30 days, the Cardholder must:

- Flag the dispute on MOPS
- Call the Card Issuer and report the dispute
- Send an email to the [Central PCard Admin](#)

PR3.2. Common Dispute Reasons

The most common dispute reasons are described below.

PR3.2.1. Merchandise Not Received

This reason is used if the Cardholder has not received the goods ordered. The Cardholder should allow sufficient time for the supplier to correct the error. If the situation is not resolved, the Cardholder is to provide details including the date that the delivery of service or merchandise was expected. In the event that the order was canceled, the Cardholder is to provide both the date of cancellation and a full explanation as to why the transaction was canceled.

PR3.2.2. Unauthorized Mail/Phone Order

This reason is used only to telephone or mail order transactions where a sales slip has not been signed with an authorized signature or imprinted with the purchaser's PCard.

PR3.2.3. Duplicate Processing

This reason is used when a transaction has been multiple-billed to an account (the amounts must be the same). The Cardholder is to provide the transaction details of the original billing, such as dollar amounts, transaction date, etc.

PR3.2.4. Merchandise Returned

This reason is used when merchandise was returned but the credit has not been posted on MOPS. The Cardholder should allow the supplier sufficient time for processing their paperwork before filing the dispute. If sufficient time has elapsed, describe the reason for returning the merchandise and the date the item was returned.

PR3.2.5. Credit Not Received

This reason is used when the Cardholder has received a credit voucher or a written refund acknowledgment from the supplier, but the credit has not been posted on MOPS within 30 days from the date on the voucher or acknowledgment.

PR3.2.6. Alteration of Amount

This reason is used when the amount of a transaction has been altered without permission. The Cardholder must acknowledge the amount before alteration, and a copy of the Cardholder's sales slip must be provided to support this reason. The amount of the credit would be the difference between the amount before alteration and after alteration.

PR3.2.7. Inadequate Description or Unrecognized Charge

This reason is used in the event that the Cardholder does not recognize the transaction description, they should request that the Card Issuer Customer Services supply a copy of the sales slip.

PR3.2.8. Wrong Merchandise Received

This reason is used when the Cardholder claims that goods or services were not received as described. It is important that the sales draft specifically describe what was purchased. In a telephone order situation, the verbal description is considered the 'document characterization.' The Cardholder must explain in the support documentation how the verbal description was different from what was actually received. An attempt must be made to return the goods and must be stated in the Cardholder's complaint. If merchandise was returned, proof of such return must be forwarded to the Card Issuer.

PR3.2.9. Other Dispute Reasons

If the reasons discussed so far do not adequately describe or fit the Cardholder's dispute circumstances, please contact the [Central PCard Admin](#).

PR4. Replacing a PCard if lost/stolen

PR4.1. It is the responsibility of the Cardholder to maintain control and security for the PCard. All precautions should be used to maintain confidentiality of all information relating to the Card, such as the Cardholder PCard number, CVV, expiration date, and Personal Identification Number (PIN). The PCard number should never be left unlocked.

PR4.2. In case of a Lost/Stolen Card

PR4.2.1. Fraudulent use of the Card and lost or stolen Cards must be reported immediately to Card Issuer and Central PCard Admin.

PR4.2.2. The Cardholder should immediately contact the Bank of Montreal Customer Service at 1-800-361-3361 to report a lost or stolen Card. This number is available 7 days a week, 24 hours a day for reporting purposes. The Cardholder must be prepared to respond to the following questions:

- Cardholder's complete name;
- Circumstances surrounding the loss of the Card;
- Any purchase(s) made on the day the Card was lost or stolen;
- Details of the last purchase amount and location;
- Personal Identification information;
- Identify if there is a need to replace the Card.

PR4.2.3. After a missing or stolen Card incident is reported to the Card Issuer, the Cardholder must also notify the [Central PCard Admin](#) by email so that the University records can be updated accordingly.

PR4.2.4. The Card Issuer will mail the replacement Cards to the [Central PCard Admin](#) within fifteen (15) working days of notification. The Central PCard Admin will notify the Cardholder when the replacement Card is available for pick-up.

PR4.3. In Case of Worn Out/Defective Cards

PR4.3.1. If a PCard needs to be replaced because it is worn out or defective, the Cardholder should email the [Central PCard Admin](#). They will, in turn request a replacement Card from the Card Issuer.

PR4.3.2. The Card Issuer will mail the replacement Cards to the Central PCard Admin within fifteen (15) working days of notification.

PR4.3.3. The Central PCard Admin will notify the Cardholder when the replacement Card is available for pick-up. Arrangements can be made to mail the card directly to the recipient.

PR4.3.4. Once you receive the new Card, the old Card must be destroyed.

PR4.4. Procurement Card Automatic Renewal

PR4.4.1. A new PCard will be issued directly by the Card Issuer and sent to the Central PCard Admin before the expiration date. The Central PCard Admin notifies the Cardholder.

PR4.4.2. If a Card is not received before the current one expires, Cardholder must call the Central PCard Admin.

PR4.4.3. The Card is valid until the last day of the month indicated (i.e. 10/17 until October 31, 2017).

PR5. Terminating a PCard

PR5.1. Termination

PR5.1.1. When a Cardholder leaves the University, it is the responsibility of the Fund Financial Manager to notify the [Central PCard Admin](#) by email.

PR5.1.2. The FFM/Delegate must obtain the Card and all outstanding documentation on the account from the Cardholder prior to final separation and approve the charges on MOPS.

PR5.1.3. A [PCard Application Form](#) (sign-in is required) needs to be completed for a new Card requested for new/replacement employees.

PR5.2. Temporary Leave

PR5.2.1. When a Cardholder leaves their position or changes responsibilities on a temporary basis (i.e. sabbatical, maternity leave, sick leave), the Fund Holder must:

- Obtain all outstanding documentation on the account from the Cardholder;
- Approve the charges on MOPS;
- And must contact the [Central PCard Admin](#) by email to have the Card cancelled.

PR5.3. Change of Department

When a Cardholder changes department, the same procedures as for "Termination" (see above) applies.

PR6. Links to Related Documentation

[Reconciling and Approving of PCard Transactions \(PCard Schedule\)](#)

[HOW TO use MOPS - McGill Online PCard Service \(View How to use Minerva Page\)](#)

PCard Form

- [PCard Application Form for Faculties/Admin Units](#) (sign-in is required)