Job Aid PC6

P-Card DOAS Special Approval Form

How To:  Process DOAS Form SPD-PC003 to request temporary P-Card increases.

Purpose:  To assist a Cardholder in completing the Temporary Special Approval Request Form intended to request temporary spending limit increases in Cycle Limits (CL), Single Transaction Limits (STL), and/or exceptions to authorized MCCs (Merchant Category Codes).

1. Open the P-Card DOAS Special Approval Form (SPD-PC003) located on the Fiscal Services Procurement Forms page: [https://fiscalservices.kennesaw.edu/procurement/forms.php](https://fiscalservices.kennesaw.edu/procurement/forms.php)

2. The form will open in Word format and it must remain in Word format. (DOAS will not accept this form in any other format.)

3. Populate the following fields in Section I: Spending Limits:
   a. State Entity Name:  Kennesaw State University
   b. Date of Request:  (Date completing the form)
   c. Cardholder(s):  (Cardholder’s name)
   d. Anticipated Transaction Date:  (Date processing the transaction)
   e. Requested STL End Date:  5 calendar days from the date in Item d. above
   f. Requested CL End Date:  End of current cycle
g. Complete the Spending Limit Exception or Change fields as needed to support the transaction(s). This includes the current CL/STL limits, the requested increased amount, and a detailed justification (*business purpose, Supplier, amount, quantity, etc.*):

<table>
<thead>
<tr>
<th>Spending Limit Exception or Change</th>
<th>Current Amount</th>
<th>Temporary Amount</th>
<th>Justification (attach supporting documentation if needed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>STL Change (Up to $4,999.99)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycle Limit Change (Up to $25,000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycle Limit &gt; $25,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Transaction Limit b/t $5,000 and $25,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Transaction Limit &gt; $25,000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- Complete the 1\(^{st}\) row if you are requesting a STL increase up to $4,999.99
- Complete the 2\(^{nd}\) row if you are requesting a CL increase up to $25,000.00
- Complete the 3\(^{rd}\) row if you are requesting a CL increase greater than $25,000.00
- Complete the 4\(^{th}\) row if you are requesting a STL increase between $5,000.00 and $25,000.00
- Complete the 5\(^{th}\) row if you are requesting a STL increase greater than $25,000.00

4. In the **Approvals** section, the Approving Official will need to approve the request by entering his/her name in the 'Supervisor Name' field and clicking the “Yes” checkbox. The approval of the Approving Official (Supervisor) should not be a physical signature; and should be that of the Cardholder’s set Approving Official in the Works system.

<table>
<thead>
<tr>
<th>Approvals:</th>
<th>By clicking on the check boxes below, we certify that we have obtained the approval for this request from the person(s) shown.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor Name:</td>
<td>□ Approved: □ Yes</td>
</tr>
<tr>
<td>APO/CUPO Name:</td>
<td>□ Approved: □ Yes</td>
</tr>
<tr>
<td>Program Administrator:</td>
<td>□ Approved: □ Yes</td>
</tr>
</tbody>
</table>

5. Save the form as a Word document and submit a service request via [service.kennesaw.edu/ofs](http://service.kennesaw.edu/ofs). Do not send the form to the email address provided in the instructions at the top of the form. If the request is sent to the address on the form, it will be sent back to P-Card Administration for processing; delaying the review/approval of the request.

6. The request should also include documentation (scanned as a .pdf document) supporting the requested amount. This documentation should be a quote, invoice, or copy of an active shopping cart showing an itemized list of what is being purchased with associated pricing.

7. For requests of STLs increases less than $4,999.99 and/or CLs increases less than $25,000.00, the form will be reviewed by P-Card Administration, then sent to DOAS and OPB for review and approval.

8. For requests of STLs increases more than $4,999.99 and/or CLs increases more than $25,000.00, the form will be reviewed by KSU’s CFO/CBO and P-Card Administration, then sent to the Office of Fiscal Affairs and DOAS and OPB for review and approval.
9. Once approved by DOAS and OPB (and KSUs CFO/CBO and the Office of Fiscal Affairs if necessary), the requesting Cardholder will be notified via email of the approval.

**Notes:**

- Turn-around times on increase request can take 24-48 hours; unless there are questions pertaining to the requested increase and/or during the Year-End period when the expected turn-around time can be longer.
- If the request pertains to any actions in Section II: Other Exceptions to Statewide Policy or Section III: Merchant Category Codes, please contact pcard@kennesaw.edu for assistance before proceeding with the request.
- The request form must remain in Word format.
- The approvals given by the Approving Official (Supervisor) should not be a physical signature.
- Single-transaction limit (STL) increases are only valid for five (5) calendar days.
- Cycle limit (CL) increases are valid for the current cycle requested.
- STL increases are to be for the amount needed to process a transaction.
- CL increases should only be for an amount that a Cardholder will exceed the set CL as a result of the purchase(s) for the remainder of the cycle.