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**E. Transaction Limit Options**

When requesting a card, one of the following transaction limit and monthly credit limit options will need to be selected:

| <b>Per Transaction Limit</b> | <b>Monthly Limit</b> |
|------------------------------|----------------------|
| \$500                        | \$1,000              |
| \$2,500                      | \$5,000              |
| \$4,999                      | \$10,000             |

Applicants can also request that Travel and Entertainment categories be enable on the card as well.

Alternative transaction limits can be requested to accommodate special purchasing circumstances.

**F. Training**

**I. Requesting Changes to a Card**

Temporary and permanent dollar limit and MCC code changes on existing cards can be requested as follows:

- For a permanent change fill out the [Change Form](#) and have it approved by the authorized approver for your school or area. Submit the approved form to the Corporate Card office. Changes for Fraternities and Sororities also require approval of your House Director and Student Affairs.
- For a temporary change send an email to the authorized approver for your school or area detailing the reason for the request. The approver will send an email to the Corporate Card Office if the change is approved. You will be notified by the Corporate Card Office when the change has been made.

**J. Using the Card**

Use the card for official University business expenditures only, and not for personal expenses. Contact the vendor and agree to the price, quantity, terms, and delivery date. The chart below provides guidance on when you should consider using your card to make a specific purchase:

| <b><i>Acceptable purchases include:</i></b>  | <b><i>Unauthorized purchases include:</i></b>   |
|--|---|
| Conference registration fees   | Personal purchases  |
| Subscriptions  | Cash advances   |
| Membership dues  | Excluded, high risk merchant categories codes (MCC)   |
| Emergencies (products or services)   | Any item exceeding the card's pre-established transaction limit   |
| Internet orders (when item needed cannot be found from any other source)                                     | Alcoholic beverages may only be purchased for functions hosted by Northwestern and should be charged to account code 76727  |
| Local purchases when there is no time to wait for next day delivery  | Travel related expenses, such as hotel accommodations, car rental, taxi rides, etc., if NOT enabled on the card.            |
| Small dollar purchases when a purchase order (PO) is not necessary   | Under no circumstances should a purchase be split into multiple transactions to bypass the single transaction dollar limit. |
| Local food and entertainment department expenses when in compliance with policy.                             |   |
| Travel related expenses, such as hotel accommodations, car rental, taxi rides, etc., if enabled on the card. |   |

Purchases must comply with the following:

- [Corporate Card Cardholder Guide](#)
- [ET Q ET /LinkSpanMCID 58 >>9DC BT /C2\\_0 s 0 scn 9.760 1 Tf 0 Tc 0 Tw 2.68 -0 0 9.96 108 33 Tm \(2](#)





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**M. Resolving Errors and Disputes**

In the case of an error, please contact the vendor first as most disputes can successfully be resolved this way. If you are unable to reach an agreement with the vendor, please contact the Corporate Card office for assistance.

**N. Paying the Bill**

Northwestern's Corporate Card is a corporate pay arrangement. Account balances will be paid in full each week by Northwestern. Please do not send your monthly statement to Accounts Payable with a check request.

**O.**

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should be left with someone in the department that will be able to reconcile the transactions on an expense report.

Transfers may complete a new [Corporate Card Application and Agreement Form](#), and obtain appropriate department approval.

It is recommended that cardholders stop using their card at least one week prior to leaving or