

# Hamilton College

# Wright Express MasterCard Application

Organization ID: hamiltongrp

Attn: Accounts Payable, Business Office

## EMPLOYEE INFORMATION

First Name	Middle Initial	Last Name
198 College Hill Road		
Business Address		Employee ID #
Clinton	NY	13323
City	State	Zip
( )		( )
Cell Phone		Business Phone
Email address	Monthly Credit Limit	Cash Amount (2%, 5% or 10% of credit limit)
Supervisor (Print Name)	Supervisor Email address	

## COMPANY INFORMATION

Trustees of Hamilton College

Company Name		
198 College Hill Road-Business Office		
Company Address		
Clinton	NY	13323
City	State	Zip
TAX EXEMPT 111599		
Budget Line	Second Line of Embossing	

## EMPLOYEE / APPROVAL SIGNATURE

**I certify that I have read, understand and will comply with Hamilton's Credit Card Policy.**

Signature of Applicant / Date

Signature of Supervisor / Date

Signature Business Office Approval / Date

**Hamilton College Corporate Credit Card Program  
Policies and Procedures  
Effective March 1, 2011**

**Overview**

The College provides a corporate credit card to eligible employees who make regular or frequent purchases for the College and/or frequently travel on College business. The card is to be used for **College expenses only** and provides a convenient cost effective way to purchase goods and services and pay for travel expenses.

The credit card program is administered by the Business Office. An application must be completed and approved by the supervisor before a card will be issued. Improper use of the card and/or non compliance with all related policies and procedures will result in loss of card privileges and may result in disciplinary action.

**Benefits to the cardholder**

- Provides control, flexibility and convenience over purchase and payment of goods and services.
- Eliminates the need to use personal funds and obtain reimbursements in many cases.
- Easy access to account transactions and real time reports, anywhere, anytime.
- Ease of tracking expenses.

**Benefits to the College**

- The College participates in a rebate program, generating cost savings.
- Reduces the number of small checks issued through accounts payable, thus generating time savings and reducing administrative costs associated with processing,
- Reduces the number of purchase orders and other paperwork associated with check processing.
- Better reporting and monitoring capability. Custom reports for managers or department chairs can be created to review and monitor spending.

**Corporate Liability**

The credit card is issued in the name of and on behalf of Hamilton College. Although the employee's name appears on the card, the College is liable for all College related charges. There is no impact on the cardholder's personal credit history.

**Tax Exempt Status**

Generally, purchases made with the Hamilton College corporate credit card are exempt from New York State sales tax. The card is imprinted with our sales tax exemption number for your convenience. When making purchases please remember to indicate that we are tax exempt. A wallet-size tax exemption card can be obtained from the Business Office. For more information about our sales tax exemption and for travel outside of New York State go to <https://my.hamilton.edu/college/purchasing/taxexemption>

## Cardholder Responsibilities

- The credit card is to be used for **College expenses only**.
- All purchases made with the card are subject to current College purchasing and travel policies.
- The card and card number must be kept secure at all times. In the event the card is lost or stolen, immediately contact the Business Office at ext. 4306.
- Review all purchases on [Wrightexpresscorpcard](#) on a timely basis. Use the notes field for a description of the charge and assign the correct general ledger code. (Refer to **Cardholder Instructions** for more details.) Check the “rev” box to indicate that you have reviewed and coded your transactions. If you see an invalid charge, contact the Business Office at ext. 4306.
- **Original** invoices or receipts must be attached, **in order**, to the transaction listing and monthly statement summary. The transaction listing must be approved by your supervisor before submitting to the Business Office. Supervisors check the “app” box to indicate their approval.
- Submit your monthly statement, transaction listing, and *original invoices or receipts* to the Business office no later than 15 days after the end of the statement cycle.  
\*\*Please adhere to any internal deadlines within your department for review and approval. Athletic cardholders should continue to submit statements and receipts to Kim Hutchins.\*\* **Cardholders who do not submit receipts on a timely basis will be subject to loss of card privileges.**
- Improper use of the card and/or non compliance with all related policies and procedures will result in loss of card privileges and may result in disciplinary action.

## Supervisor Responsibilities

- After receiving e-mail notification that the monthly statements are ready, have your employees notify you when they are ready for you to review their transactions.
- For each employee, review and approve all purchases on [Wrightexpresscorpcard](#). Indicate your approval by checking the “app” box on the transaction listing.
- Although the Business Office will review receipts, ask your employee to see receipts if additional clarification is needed. Your approval signifies to the Business Office that you agree with the charges and the budget lines to which they should be applied.

**Hamilton College**  
**Wright Express MasterCard**  
<https://www.wrightexpresscorpcard.com>  
866-558-5982

**Cardholder Instructions**

**To Apply for a Corporate Credit Card**

1. Complete Wright Express MasterCard Application form.
2. Have your supervisor sign and approve the application.
3. Return completed form to the Business Office.

**Card Activation**


1. Call the number on the card to activate. If you are transferred to a customer service representative and they ask for the address and phone number on the card, the address is 198 College Hill Rd. and the phone number is 315-859-4376.
2. Remove sticker and begin card use.

**Internet Access Set Up**



1. You will receive two emails, one with your user name and one with your temporary password.
2. Go to the website, <https://www.wrightexpresscorpcard.com> enter user name and password. The organization ID is Hamiltongrp. **(It is not necessary to enter your social security number)**. You will be taken to a screen that asks you to accept terms. Once you accept, you will be prompted to change your temporary password.
3. You will receive monthly notification by email that your statement is ready. If you need to **edit** or **add** notifications, contact the Business Office ext. 4306.
4. At the end of the month you will receive an email notification that your statement is ready. Attached to the email will be a statement summary (the first page of the statement) and an excel spreadsheet with a detailed list of transactions for the month.
5. Print the Statement Summary and follow transaction maintenance instructions on page 2.

**Contact Roxann Jeffers at ext. 4306 for questions or assistance with activating your new card, setting up internet access, and using the on line tools.**

## View and Print Statement

1. Click on the “View Statements” quick link on the right side of the home page or click on Transaction Maint, Statements.
2. Select the Statement Closing Date from the drop down and check the My Cards box. Click Search.
3. Click the disk with the green arrow pointing down  to open or save your statement.
4. Print the Statement to attach as a cover page to the transaction listing.

## Review and Code Transactions

1. Click on the “Manage Transactions” quick link on the right side of the home page or click on Transaction Maint, Transaction Management.
2. Select the Billing Cycle from the drop down and check the My Cards box. Click Search.
3. Enter the 13-digit budget line / general ledger code or select the magnifying glass  to search all available budget lines. Enter any part of the budget line or description and click search. Click on your number and it will populate the general ledger box.
4. Transactions can be split by clicking the split transaction icon . Enter the number of splits and click continue. Input split values by amount or percent. Total of splits must equal 100% of original transaction. Click Save.
5. Click on Notes to enter a description for the charge (e.g. airfare to Chicago to attend a conference, admissions event, or donor visit, etc.).
6. Click the “Rev” box to indicate that you have reviewed and coded your transactions.
7. **Click the Save button often to avoid being logged out.**
8. Print the Transactions.
9. Notify your supervisor that your statement is ready for review and approval. Supervisors see **Supervisor Approval of Transactions** below. **After your supervisor has approved all transactions, you may need to re-print for any changes.**
10. Submit your statement, transactions, and *original invoices or receipts* to the Business Office no later than 15 days after the end of the statement cycle.  
**\*\*Please adhere to any internal deadlines within your department for review and approval. Athletic cardholders should continue to submit statements and receipts to Kim Hutchins.\*\***

## Supervisor Approval of Transactions

1. Click on the “Manage Transactions” quick link on the right side of the home page or click on Transaction Maint, Transaction Management.
2. Select the Billing Cycle from the drop down. Uncheck the My Cards box.
3. In the Search Criteria box click the drop down to search by Last Name. Click Search.
4. Review the budget lines, notes, splits, and invoices/receipts for all transactions. Click the “App” box to indicate that you approve all transactions.
5. **Click the Save button often to avoid being logged out.**
6. Notify the cardholder that you have approved all transactions and the statement is now ready to be sent to the Business Office. Statement packages are due to the Business Office no later than 15 days after the end of the statement cycle.