





Financial Systems Access Policy Addendum

This addendum establishes the roles individuals may hold for University-wide financial systems or for Harvard-issued card programs. Any individual with access to these systems or programs must follow applicable Harvard policies as well as the terms and conditions of the cardholder agreement. Schools and units have the ultimate decision to determine when and what type of University-issued card is appropriate and may have more restrictive guidelines, contact your local Finance Office for additional information.

Type of Card	Harvard Employee ¹	Contingent Worker ² (CW)	Affiliated Hospital	Consultant/Agency
<u>Purchasing Card</u> 	Cardholder: Yes ³ Concur PCard Delegate: Yes Concur PCard Approver: Yes	Cardholder: Yes Concur PCard Delegate: Yes Concur PCard Approver: Generally, No ²	Cardholder: Yes ⁴ Concur PCard Delegate: Yes Concur PCard Approver: No	Cardholder: No Concur PCard Delegate: No Concur PCard Approver: No
<u>Corporate Card</u> <u>Travel Policy</u> 	Cardholder: Yes Concur Expense Delegate: Yes Concur Expense Approver: Yes	Cardholder: Yes Concur Expense Delegate: Yes Concur Expense Approver: Generally, No ²	Cardholder: No Concur Expense Delegate: Yes Concur Expense Approver: No	Cardholder: No Concur Expense Delegate: Yes Concur Expense Approver: No
<u>Declining Balance Card</u> 	Cardholder: Yes - Includes Harvard Students ³ B2P Shopper/Requestor: Yes B2P Approver: Yes	Cardholder: Yes B2P Shopper/Requestor: Yes B2P Approver: Generally, No ²	Cardholder: No B2P Shopper/Requestor: Yes B2P Approver: No	Cardholder: No B2P Shopper/Requestor: Yes B2P Approver: No
<u>Department Card</u> 	Cardholder: Yes Concur Expense Delegate: Yes Concur Expense Approver: Yes	Cardholder: Yes Concur Expense Delegate: Yes Concur Expense Approver: Generally, No ²	Cardholder: No Concur Expense Delegate: Yes Concur Expense Approver: No	Cardholder: No Concur Expense Delegate: Yes Concur Expense Approver: No

Contingent Workers: CWs who do not qualify for a Harvard-issued card who, with prior approval from their hiring manager, incur University business expenses may be reimbursed for those expenses through [Fieldglass](#).

Affiliate Hospitals and Consultants/Agencies are reimbursed through Buy-to-Pay as a non-employee reimbursement (for valid Harvard business expense) or payment request/purchase order. In all cases payments from Harvard must follow appropriate Harvard Travel and Reimbursement Policies.

¹ With the approval of the Financial Dean/Designee, a future employee or faculty emeritus may hold a corporate card. Generally, cards should not be issued to temporary employees **unless** there is a significant Harvard business need. The decision to issue a temporary employee a credit card is ultimately at the School or unit's discretion and may qualify when appropriately prescreened and with the approval of the Manager and Financial Dean/Designee. See [Who is Eligible to Use Concur](#).

² A Contingent Worker (CW) is someone working for a third-party agency (e.g., AllSource) most often employed and paid through Harvard's Managed Service Provider (DZConneX [Formerly Yoh]). Generally, CWs should not have Harvard-issued cards or access to financial systems (Concur/B2P) **unless** there is a significant Harvard business need, (e.g., frequent Harvard business travel). The decision is ultimately at the School or unit's discretion, and CWs may qualify for a university-issued card or access financial systems when appropriately prescreened and with the approval of the Manager and Financial Dean/Designee. All individuals must have an end date of one year from date of set-up in Concur or B2P and must be reviewed and extended, if appropriate, on an annual basis. The School/local unit will be responsible for any unpaid corporate card expenses. Authorized Requestors must complete a [Concur Access Form](#) for these individuals. **Anyone applying for a card or receiving access to a financial system must have an HUID.**

³ Certain graduate or undergraduate students may be eligible for a PCard or Declining Balance Card. Contact your Local Card Administrator for information.

⁴ Allowable with Special Affiliate Agreement.