



Purpose: This form is used by full time, part time, or recurring term University employees to apply for a Corporate Purchasing Card (PCard).

Instructions: Save as a PDF and submit to the [Staff Service Centre](#) using Corporate Purchasing Card (PCard) Application Form Service Request.

Cardholder Information – *Applicant must be a full time, part time or recurring term employee.*

First (Legal) Name:

Last Name:

Email Address (CCID):

@ualberta.ca

Employee ID (7-digits):

Date of Birth (YYYY-MM-DD):

Department, Faculty or College Name:

Campus Mailing Address – *Specify the U of A campus address where the card is to be delivered.*

Note: Corporate Purchasing Cards cannot be mailed to the cardholder's home address.

Credit Card Limits – *Specify the transaction limits that are appropriate for the Cardholder usage.*

\$5,000 per Transaction (Default)

\$15,000 per Month (Default)

Specify Other Monthly Limit:

Note: If you have specified a higher monthly limit other than the default amounts, tell us the nature of the expenses and why they cannot be procured through methods such as SupplyNet.

Transaction Types – *Select **ONE** option below.*

Note: Per Diems (daily meals) for cardholders are not eligible on PCards, only Hospitality charges.

- **UAB1 – General Purchasing:** Card is open for general purchases, excluding restaurants
- UAB2 – General Purchasing + Catering:** Card is open for food and beverage anywhere except hotels/lodging
- UAB3 – General Purchasing + Catering + Hospitality:** Card is open for food and beverage within hotels/lodging; conference booking; accommodations for students/visitors
- UAB4 – General Purchasing + Catering + Hospitality + Car Rental + Hotels**
- BCN – General Purchasing + Catering + Hospitality + Car Rental + Hotels + Travel Charges:**
Card is open for all purchases including baggage and seat selection fees. Airport lounge passes are not permitted. Excludes airfare tickets, which have to be purchased with a TAP # through Maritime Travel.

Cardholder Agreement – Check each box below and sign to confirm you have read and agree to the Credit Card terms.

I am an active employee with the University of Alberta.

I acknowledge that I am applying for a Corporate Purchasing Credit Card (PCard). I have read, understood and agree to adhere to all requirements established in the Corporate Purchasing Card Procedure on the UAPPOL website.

I acknowledge that this card will be issued to me to make authorized purchases of goods and services in the course of my regular duties at the University and I will not use it for personal purchases.

I shall protect the card and card number and understand that it is for my university business use only. The card is in my name and I am responsible for all charges against the card.

If the card is lost, stolen or otherwise compromised, I will immediately notify the Bank of Montreal and Compliance Services – Shared Services.

I will obtain a detailed receipt/invoice for each purchase and will reconcile all transactions in a timely manner each month.

I understand that my card may be suspended or cancelled if I fail to meet the conditions in the Corporate Purchasing Card Procedure, including failure to reconcile my monthly transactions in PeopleSoft My Wallet within expected timelines.

I will surrender the card immediately upon termination of employment, whether for retirement, voluntary or involuntary reasons.

I agree that if my card is open for travel expenses (Transaction Types UAB4 or BCN), it will be used only for eligible expenses as detailed in the [Travel Processes and Expense Procedure](#) and the [Travel Processes and Expenses Procedure and Appendix A Schedule of Allowable Expenses \(UAPPOL\)](#).

I agree that if my card is open for hospitality expenses (Transaction Types UAB2, UAB3, UAB4 or BCN), I will follow the restrictions and documentation requirements as detailed in the [Hospitality, Working Sessions/Committee Meetings and University Employee Functions Procedure \(UAPPOL\)](#).

Cardholder Printed Name

Cardholder Signature

Date

Department Authorization: To be approved by the Supervisor, General Manager, Faculty General Manager **or** Chief of Staff

Approver Printed Name

Approver Signature

Date

Personal information provided is collected in accordance with section 4(c) of the Alberta Protection of Privacy Act (POPA) and will be protected under section 10. The personal information collected will be used and disclosed by sections 12, 13 of the POPA. Your name, email, department and date of birth information will be disclosed to the Bank of Montreal for the purpose of applying for a University of Alberta Purchasing Card. The University of Alberta uses automated systems to generate content and to make decisions, recommendations and predictions. The personal information collected may be included in these automated systems. For further information about collection, use and disclosure of this information, please contact: Shared Services, 10230 Jasper Avenue, Edmonton, Alberta, T5J 0B2, 780-492-8000.