Corporate Purchasing Card (PCard)

Change Request to Current Credit Card

UNIVERSITY OF ALBERTA

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Purpose: This form is used to request a change to a current Corporate Purchasing Card (PCard).
Instructions: Save as a PDF and submit to the Staff Service Centre using the Change Request to a Current Credit Card Service Request.

Cardholder Information – *Information should match application form.*

First (Legal) Name: ____ Last Name: ____

Email Address (CCID): ____@ualberta.ca Employee ID (7-digits): ____

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

- (●) $15,000 per Month (Default)
- ( ) Specify Other Monthly Limit ____

Note: If you have specified a higher monthly limit other than the default amount, 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 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.