



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

The personal information requested on this form is collected under the authority of Section 33 (c) of the Alberta Freedom of Information and Protection of Privacy Act and will be protected under Part 2 of that Act. 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. Should you require further information about collection, use, and disclosure of personal information, please contact: Director, Procurement, 3rd Floor, Materials Management Building, 8415 - 117 Street NW, Edmonton, Alberta T6G 2R3. (780) 492-4638.