DEPARTMENT INFORMATION:

Department Name: Insert your current department name or the department name you wish to appear on your PCard in the box to the left.

- If requesting changes to an existing PCard account, insert the name currently on your PCard account.

PCard Index: Insert the current index associated with your PCard.

- If requesting a new PCard Account, insert the index that your department will assign to this new PCard account.

Card # (last four digits): If you have an existing PCard account, insert the last 4 digits of your PCard number.

Card Custodian Name & Contact Information: Insert the name and contact information of the current Card Custodian. Please include email address.

- If requesting a new PCard Account, insert the name of the person who will serve as the Card Custodian.
- If requesting changes to an existing PCard account, insert the name of the person currently serving as Card Custodian.

Budget Authority Name & Contact Information: Insert the name and contact information of the current Budget Authority. Please include email address.

- If requesting a new PCard Account, insert the name of the person who will serve as the Budget Authority.
- If requesting changes to an existing PCard account, insert the name of the person currently serving as Budget Authority.

ACTION ITEMS:

Please mark all actions that apply.

New Account: Check this box *only* if you are requesting a new PCard account.

- **Requested Monthly Credit Limit:** Insert the monthly dollar limit you are requesting. The default limit is $5,000.
- **Requested Single Transaction Limit:** This can be equal to or less than your monthly limit.
- **PCard Billing Address:** This is your

department's mailing address.

- **Note**: A VISA Application will be sent to the department upon receipt of completed Intake Sheet. PCS will request the department complete all required training.

Updates to PCard Authorization: Add Role

- Use this section to add someone's role to the PCard account. Insert the name of the current person with the corresponding role. Unless otherwise noted, the effective date will be the signature date on the Intake Sheet.

Hint: To add multiple people to a single role, use a hard return after each name in the Name section.

Updates to PCard Authorization: Delete Role

- Use this section to delete someone's role on the PCard account. Insert the name of the current person with the corresponding role. Unless otherwise noted, the effective date will be the signature date on the Intake Sheet.

Hint: To delete multiple people from a single role, use a hard return after each name in the Name section.

Update Existing PCard Account

- **Change in Index:** Use this section to change the index on your existing PCard account and insert the new index.
- **Change in Address:** Use this section to change the address on your existing PCard account and insert the new address.
- **Change in Department Name**: Use this section to add change the department name on your PCard account and insert the new department name.
- **Change in Monthly Credit Limit/Change in Single Transaction Limit:**
  - o Temporary Change - check this box if requesting a temporary increase.
  - o Insert the temporary change end date.
  - o Permanent Change - check this box if requesting a permanent change.
  - o Insert the requested credit limit.
- **Cancel PCard:** Use this section to cancel a current PCard account.

Other Requests: Check this box if you have a request that is not listed under any of the other options above. Please provide a brief narrative.

SIGNATURE BLOCKS:

The PCard Intake Sheet must be signed by both the Budget Authority and Card Custodian for all changes. PCS no longer requires an Authorization Agreement to accompany the Intake Sheet.