

PCS PCard Intake Sheet Instructions

A PCS PCard Intake Sheet signed by both the PCard Budget Authority and PCard Custodian is required for all PCard requests and updates.

DEPARTMENT INFORMATION:

Always complete this section.

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

- **Note:** There is a 22 character limit for the name appearing on your PCard.
- If requesting changes to an existing PCard account, insert the name currently on your PCard account (name prior to any requested changes).

Current PCard Index: Insert your current PCard index. The index can be found on the front of your card, under the department name.

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

Current PCard Last 4 Digits of Card #: If you have an existing PCard account, insert the last 4 digits of your PCard number. The PCard number can be found on the front of your PCard above the expiration date.

Current PCard Custodian Name & Contact Information: Insert the name and contact information of the current PCard Custodian.

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

Current PCard Budget Authority Name & Contact Information: Insert the name and contact information of the current Budget Authority.

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

ACTION ITEMS:

Please mark all actions that apply to your submittal

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

- **Regular PCard:** A Visa credit card issued to departments to purchase goods and services according to the Procurement Card Policy.
- **Team Card:** A PCard specially issued to select departments solely for use by that department for team travel and related team travel expenses. Specific rules

PCS PCard Intake Sheet Instructions

governing the allowable use of Team Cards if found under Team Card Procedures – see <http://pcs.uoregon.edu/content/statutesregulationspolicies>.

- **Requested Credit Limit-** Insert the dollar amount you are requesting. Default limit is \$5,000.
- **PCard Billing Address-** Insert your department's billing address.
- **Note:** Your Department Name, PCard Custodian, Budget Authority and PCard Index should be completed in the **Department Information** section.
- **Note:** In response to your new account request, PCS will provide you a VISA Application to complete and return to pcard@uoregon.edu. Once your returned VISA application is processed and accepted by U.S. Bank, PCS will notify you and request you complete all required training and submit a completed PCard Authorization for your PCard new account.

Updates to PCard Authorization that require the submittal of a new PCard Authorization:

NOTE: The changes shown in this section require a new PCard Authorization be submitted.

- **Change Adding Budget Authority**
 - Use this section to change the current Budget Authority on the PCard account. Insert the name of the new Budget Authority and include the date this change will be effective.
- **Change Deleting Budget Authority**
 - Use this section to delete the current Budget Authority on the PCard account. Insert the name of the current Budget Authority and include the date this change will be effective.
- **Change Adding Card Custodian**
 - Use this section to change the current Card Custodian on the PCard account. Insert the name of the new Card Custodian and include the date this change will be effective.
- **Change Deleting Card Custodian**
 - Use this section to delete the current Card Custodian on the PCard account. Insert the name of the current Card Custodian and include the date this change will be effective.
- **Change Adding Back-Up Card Custodian**
 - Use this section to change the current Back-Up Card Custodian on the PCard account. Insert the name of the new Back-Up Card Custodian and include the date this change will be effective.
- **Change Deleting Back-Up Card Custodian**
 - Use this section to delete the current Back-Up Card Custodian on the PCard account. Insert the name of the current Back-Up Card Custodian and include the date this change will be effective.

Updates to PCard Authorization that require the submittal of the revised PCard Authorization previously approved by PCS: Check all boxes that apply and complete the form fills with the updated information.

- **Note:** The changes shown in this section can be made on the existing PCard Authorization.
- **Add PCard User(s)**

PCS PCard Intake Sheet Instructions

- Use this section to add PCard Users and insert the name or names of all persons whom you wish to add as users to the PCard account.
- **Delete PCard User(s)**
 - Use this section to delete current PCard Users and insert the name or names of all persons whom you wish to delete as card users from the as PCard account.
- **Add PCard Budget Authority Designee**
 - Use this section to add the PCard Budget Authority Designee and insert the name of the person whom you wish to add as the PCard Budget Authority Designee.
- **Delete PCard Budget Authority Designee**
 - Use this section to delete the current PCard Budget Authority Designee and insert the name of the person whom you wish to delete from the PCard account as PCard Budget Authority Designee.

Other Updates to Existing PCard Account. Do not attached a copy of the PCard Authorization: Check all boxes that apply and complete the form fills with the updated information.

- **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.
 - **NOTE:** Since this address will be used to mail your PCard statements to your department, the address must be to a secure location within the department.
- **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 Credit Limit**
 - Temporary Change - check this box if requesting a temporary increase.
 - Insert the temporary change end date.
 - Insert the requested credit limit.
 - Complete the Basis for Request section.
 - Permanent Change - check this box if requesting a permanent change.
 - Insert the requested credit limit.
 - Complete the Basis for Request section.
 - Basis for Request – provide a brief description of the reason for the requested credit limit change.
- **Cancel PCard**
 - Use this section to cancel a current PCard account. Please provide a brief description of the reason for the cancellation.

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

PCS PCard Intake Sheet Instructions

DEPARTMENT CERTIFICATIONS:

- **Please read these two sections carefully and check each box.**
- Intake forms that do not have both certifications checked will not be accepted. If you are unable to certify either item, please contact PCS to discuss at 6-2419.
- These boxes do not need to be checked if not making personnel changes.

SIGNATURE BLOCKS:

The PCS PCard Intake Sheet must be signed by both the PCard Budget Authority and PCard Custodian.

- **Remember to attach a copy of your current PCard Authorization when making personnel changes.**

If you have any additional questions about the PCS PCard Intake Sheet, please contact PCS at 6-2419 or send an email to pcard@uoregon.edu.