

**Instructions:**

- Complete all fields of this form to request a department or individual University Purchasing Card ("PCard").
- In the "Action" section, select **New**, **Cancel**, or **Change** from the drop-down menu provided.
- After completion, please submit to your **Lead Administrator or Operations Manager**.

\* This form is for PCard requests only \*

Required Cardholder Information					
Action:		First Name:		Last Name:	
UPI #:		Country of Citizenship:		Social Security # (last 4 digits only):	
Date of Birth:		Email:		Office Phone #:	
Passcode (cannot include the word "Yale"):				Cell Phone #:	
Organization:				Cost Center Requesting Card:	

Required PCard Information	
Last 4 Digits of Card Number (Required for Changes and Cancellations):	
Business Office Street Address (Include P.O. Box, City, State, Zip) (Required for New PCards and Changes to Address):	
Name on Card (Required for Department Card <u>only</u> ):	

** COMPLETE THIS SECTION FOR <u>NEW</u> CARDS ONLY** PCard Type and Limits (select one of the values below for each row)		
Type of Card:	<input type="checkbox"/> Individual Card	<input type="checkbox"/> Department Card
Air/Rail and all T&E	<b>Individual Card Limits</b>	<b>Department Card Limits</b>
Max Amt. per transaction:	<input type="checkbox"/> \$500 <input type="checkbox"/> \$2,000 <input type="checkbox"/> \$5,000	<input type="checkbox"/> \$500 <input type="checkbox"/> \$1,000
Max Amt. per month:	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000 <input type="checkbox"/> \$25,000	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000
Supplies / other retail items	<b>Individual Card Limits</b>	<b>Department Card Limits</b>
Max Amt. per transaction:	<input type="checkbox"/> \$500 <input type="checkbox"/> \$2,000	<input type="checkbox"/> \$500 <input type="checkbox"/> \$1,000
Max Amt. per month:	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000
Publishing Fees	<b>Individual Card Limits</b>	<b>Department Card Limits</b>
Max Amt. per transaction:	<input type="checkbox"/> Not Applicable <input type="checkbox"/> \$3,000 <input type="checkbox"/> \$5,000	<input type="checkbox"/> Not Applicable <input type="checkbox"/> \$3,000 <input type="checkbox"/> \$5,000
Max Amt. per month:	<input type="checkbox"/> Not Applicable <input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000	<input type="checkbox"/> Not Applicable <input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000

Requestor Information		
Requestor Name (person completing this form):		
Requestor Signature:		Date:

Approver Information		
Approver Name (Lead Administrator or Operations Manager):		
Approver Signature:		Date:

Lead Administrators and Operations Managers – Please email completed form to [purchasing.card@yale.edu](mailto:purchasing.card@yale.edu).

Please call 203-432-3227 with any questions.