

UCSC Pro-card Application and Agreement

Privacy Notification

The information collected on this form has been requested by US Bank. The Bank uses this information for security and verification purposes. When the cardholder contacts the Bank, their employee identification number will be requested to verify the identity of the caller. Individuals have the right to review their own records in accordance with University policies and collective bargaining agreements. Information on applicable policies and agreement can be obtained from campus, laboratory or Office of the President Staff and Academic Personnel Offices. The official responsible for maintaining the information contained on this form is the Campus Purchasing Card Administrator.

CARDHOLDER INFORMATION

First Name

Last Name

Middle Initial

maximum 21 characters total

Work Phone Number

Work Email Address

Employee ID

begins with 7

Pro-card Descriptor

required if applicant has multiple cards; 21 character maximum

UCSC Mailstop

City

State

Zip Code

ACCOUNT INFORMATION *FOAPAL*

Fund

Org

Account

Program

Activity

optional

CARD LIMITS *specified by Unit Manager and Supervisor*

Monthly Limit
total \$ per month

Single Purchase Limit
total \$ per transaction; maximum \$2,500

Daily Purchase Limit
total \$ per day

DEPARTMENT INFORMATION & APPROVAL

PCA Name
printed or typed

for Purchasing use
PCA Hierarchy 5 digits

Name of Pro-card Supervisor
printed or typed

for Purchasing use
Supervisor Hierarchy 4 digits

TRAINING AND TAX INFORMATION

Training Completed

Yes

No

204 Forms Submitted

Yes

No

for Purchasing use

Date Training Completed

Cardholder Banner Vendor Number

UCSC Pro-card Application and Agreement

Applicant Name

Date

Department/Unit

The University of California has entered into an agreement with US Bank that provides qualified employees with a Pro-card for University work-related purposes. The Pro-card is issued to the employee for the purchase of selected materials and services. The University pays expenses incurred on the Pro-card. The policies contained in this agreement and in the Pro-card User's Guide govern the use of the Card. Policy misuse will result in revocation of Cardholder privileges and may result in personal liability for purchases and disciplinary action up to and including dismissal.

Participating Employee Acknowledgment of Responsibility and Card Limits

By participating in the UCSC Pro-card Program as a Cardholder, you assume responsibilities pertaining to the operation and administration of the Pro-card Program. The responsibilities include, but are not limited to the following:

- Adhering to the use restrictions outlined in the user manual and further detailed in this agreement
- Safeguarding the card
- Verifying and reconciling account activity
- Surrendering and ceasing to use the card upon reassignment or separation from the University.

Failure to fulfil these and other responsibilities outlined in the User Guide may result in revocation of Cardholder privileges and possible disciplinary action up to and including dismissal.

Use Restrictions

Pro-cards are issued at the discretion of the Procurement and Business Contracts Office to qualified employees. The Pro-card remains the property of US Bank. It may not be transferred to or used by anyone other than the Cardholder. The Bank or UCSC may suspend or cancel Cardholder privileges at any time for any reason. The Cardholder will surrender the Pro-card upon request to UCSC or any authorized agent of US Bank.

Each Purchasing Card has individually assigned spending limits that may not be exceeded under any circumstance. In addition to the list of goods and for which the card may not be used (restricted goods and services – see Pro-card User Guide), specific restrictions on this card are:

Purchasing Card Abuse & Fraud

Abuse of the Purchasing Card may result in revocation of the card and personal liability for purchases. Card abuse includes:

- Failure to submit proper documentation supporting each purchase to FAST or Office of Record, which can include Bay Tree Bookstore, PP&C, the Library, Physical Plant and UCO Lick Observatory.
- Purchasing goods restricted by the campus or through this agreement.
- Exceeding bank credit line limit
- Utilizing the Purchasing card for purchases greater than the established card limit
- Failure to return the Purchasing Card when reassigned, separated from the University or upon request

The following are considered fraudulent activities and will result in revocation of the card, personal liability for purchases and may result in termination and/or legal action against you as the Cardholder:

- Purchase of goods and services for non-University work related purposes
- Use of the card or account after separation from the University
- Use of the card or account after notice of cancellation

Receipts

It is the Cardholder's responsibility to collect and retain itemized receipts. All card purchases must have supporting documentation including detailed receipts and/or packing slips. Failure to retain and submit proof of goods or services purchased, in a timely manner, is considered misuse and may result in revocation of Cardholder privileges.

Disputes

It is the Cardholder's responsibility to track any erroneous charges, returns or adjustments and to ensure proper credit is given on subsequent statements. Do not accept cash as a refund; only a credit to the card account is acceptable.

Lost/Stolen Pro-cards

If the pro-card is lost or stolen, immediately contact the Bank's 24 hour toll free number (800-344-5696) and mailto:procard@ucsc.edu.

Validation & Safekeeping

Sign the Pro-card immediately upon receipt. When the expiration date is passed and/or after you have received a new Pro-card, cut the old card in half and dispose of it. Make sure the Pro-card is returned to you after each charge and verify that the returned Pro-card has your name on it.

The Undersigned Pro-card Cardholder applicant and appropriate University Officials request a UCSC Pro-card be issued to the applicant. This applicant has read the above agreement and guidelines and agrees to be bound by their terms and conditions.

Signatures & Authorizations

1. Applicant Signature _____
Date _____

2. Pro-card Supervisor Signature _____
Date _____

3. Department Head/Principal Investigator _____
Date _____

4. Budget Authorization Signature _____
Date _____

5. Pro-card Authorizer Signature _____
Date _____

Sign **after** receiving Pro-card to Acknowledge Completion of Training, and Receipt of Pro-card and User Guide

Cardholder Signature _____
Date _____

Document Retention: Permanent until superseded. For non-contract and grant funds retain three years after change has been made to account and five years after account closure. For contract and grant funds retain in accordance with EMF grant guidelines.