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| **Corporate Credit Card Application/Change Form**    **PAY TO:**    **NAME ADDRESS** | | | |
| **Guidance** | | | |
| This form must be completed when you are applying for a Corporate Credit Card and also where you are an existing Corporate Card holder and you require a change to your current card limit. Please refer to the [Corporate Credit Card Policy](https://www.ed.ac.uk/finance/for-staff/financial-regulations-policies-and-procedures/policies-and-procedures) and the [card guidance document](https://uoe.sharepoint.com/:u:/r/sites/FinanceOperations/SitePages/Corporate%20Credit%20Cards.aspx?csf=1&web=1&e=oTHf5U) before applying for a card.  Once completed, please send this completed form via email to [finance.helpline@ed.ac.uk](mailto:finance.helpline@ed.ac.uk) (marked for the attention of Service Assurance Team in the subject header). Please copy in your manager/approver into the submission as proof of authorisation.  We will let you know if your application has been approved by the Finance Directorate within 2-3 weeks at which point we will contact you about next steps. | | | |
| **Employee details** | | | |
| Full name: | |  | |
| Job Title: | |  | |
| Staff ID Number: | |  | |
| Department/School: | |  | |
| Email address: | |  | |
| Contact telephone number: | |  | |
| I have access to People & Money (Y/N) | |  | |
| **Change to existing credit card limit** | | | |
| Temporary/Permanent change (please tick) | | Permanent change | Temporary change |
| Change limit from: |  | Change limit to: |  |
| Date change effective from (DD/MM/YYYY): |  | End date if temporary change (DD/MM/YYYY): |  |
| **Reason for change of card limit -** Please state in no more than 300 words the justification for a change to your existing card limit *(leave blank for new card applications):* | | | |
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| **New Corporate Credit Card Applications** | | | | |
| Please confirm the reason a card is required by ticking the expenditure type: | | Hospitality & Entertaining costs | |  |
| \*Travel and accommodation costs (i.e. group bookings) | |  |
| International travel costs | |  |
| Conference costs (group bookings) | |  |
| Event planning costs (i.e. field trips, student events) | |  |
| Other (i.e. online purchases) | |  |
| **Proposed credit required** *(based on anticipated usage of the card and the likely expenditure to be incurred)***:** | |  | | |
| **If card is required for a temportary timeline, please confirm:** | | | | |
| Card required from (DD/MM/YYYY): |  | Card required until (DD/MM/YYYY): |  | |
| **Business case for new card -** Please state in no more than 300 words the justification for your card application. This must include details of why alternative payment routes (i.e. Travel Management Company, Procurement and Expenses) cannot be used. *Please attach a copy of any pre-engagement conversations you have had with procurement to support your application where the card is required for subscriptions, online payments, goods and services etc.*  When applying for a card for travel and accommodation costs, you must provide details of the frequency of travel that will be undertaken in the course of official duties along with approximate costs. Corporate Credit Cards are best suited to staff who travel internationally on a regular basis and staff who are responsible for arranging and paying for group travel. Individual applications should not be made for infrequent low value travel costs. | | | | |
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| **Approval of application (to be signed by Line Manager or Head of School/Department)** | | | | |
| Name of authoriser: | |  | | |
| Job title of approver: | |  | | |
| Date (DD/MM/YYYY): | |  | | |