

# UCSC Pro-Card Application

**Important:** For full functionality, it may be necessary to download a copy of this form to your computer and open it with Adobe Reader or Acrobat Professional. To save a completed form, you may need Acrobat Professional. For technical and accessibility assistance, contact [finaff-tech@ucsc.edu](mailto:finaff-tech@ucsc.edu), for form questions, [procard@ucsc.edu](mailto:procard@ucsc.edu).

Office Use Only			
Training		U.S. Bank	
Supv Hierarchy		Banner ID	
PCA Hierarchy		Filemaker	
Account			

## (Privacy Notification)

The information collected on this form has been requested by U.S. 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.

### Section 1: Cardholder Setup

Last name <input type="text"/>	First name <input type="text"/>	Middle Initial <input type="text"/>	Employee ID <input type="text"/>
<i>maximum 21 characters total for name</i>			
UCSC Mailstop <input type="text"/>	Phone Number <input type="text"/>	Email Address <input type="text"/>	
Pro-Card Authorizer Name <input type="text"/>	Department <input type="text"/>	Pro-Card Supervisor/Reviewer Name <input type="text"/>	

### Section 2: Training and Tax Information - Check to acknowledge requirement

- Complete [training](#) before submitting application
- [Payee Setup 204](#) must be on file or submitted prior to submitting application

### Section 3: Card Limits (specified by PCA and Supervisor)

Monthly limit <input type="text"/> <i>(total \$ per month)</i>	Single purchase limit <input type="text"/> <i>(total \$ per transaction: max. \$2,500)</i>	Daily Purchase Limit <input type="text"/> <i>(total \$ per day)</i>	Pro-Card Descriptor <input type="text"/> <i>Required if applicant has multiple cards: 21 characters max.</i>
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### Section 4: Pro-Card Descriptor & Account Information (FOAPAL)

Fund	Organization	Account	Activity
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section 5: Authorizations and Signatures

The Undersigned Pro-card Cardholder applicant and appropriate University Officials request a UCSC Pro--Card be issued to the applicant. The applicant has read the guidelines/agreement on the reverse side and agrees to be bound by these terms and conditions.

Applicant Signature <input type="text"/>	Print Name <input type="text"/>	Date <input type="text"/>
Pro-Card Supervisor /Reviewer or Principal Investigator Signature <input type="text"/>	Print Name <input type="text"/>	Date <input type="text"/>
Dept. Head/Budget Authorizer/Research Admin Manager Signature <input type="text"/>	Print Name <input type="text"/>	Date <input type="text"/>
Pro-Card Authorizer (PCA) Signature <input type="text"/>	Print Name <input type="text"/>	Date <input type="text"/>

### Section 6: Submit Information

Submit completed form to: Mail stop: FAST/AP  
or FAX: 459-1723

# UCSC Pro-Card Agreement

The University of California has entered into an agreement with U.S. 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 fulfill 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 to qualified employees at the discretion of the Procurement and Business Contracts Office. The Pro-Card remains the property of U.S. 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 U.S. Bank.

Each Pro-Card has individually assigned spending limits that may not be exceeded under any circumstance. In addition to the list of goods and services for which the card may not be used (restricted goods and services) there are restrictions on the purchase of cylinder/liquid gases, chemicals, subscriptions, postage, office supplies (Federal grants) memberships and food. See: Pro-Card User Guide) for additional restrictions. Specific restrictions on this card are:

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## 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.

## 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 close. For contract and grand funds retain in accordance with EMF grant guidelines.

## 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.

## Pro-Card Abuse & Fraud

Abuse of the Pro-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
- Services

Sign and date after receiving Pro-Card to:

Acknowledge completion of training and receipt of Pro-Card and User Guide

Signature

Date

Print Name: