

Purchase Card Application Form



The Purchase Card account is a board-authorized financial institution account that facilitates frequent, low-value purchases by district employees with individual purchase cards.

New Cardholder Request Details (Principal/Manager to complete):

Employee Name: _____

Employee Location: _____

Default General Ledger Code: _____

Reason(s) Card Required (Principal/Manager to complete):

Cardholder Responsibilities:

- Ensuring purchases are in accordance with district policies/procedures (see **Purchasing Administrative Procedure**).
- Monthly reconciliation, including verification of all charges and submission of statement and receipts by required deadlines (instructions are communicated monthly).
- Safeguarding the card and preventing unauthorized access and charges to the account.
- Notifying the financial institution and Purchasing Services immediately if a card is lost or stolen.
- Notifying the financial institution and Purchasing Services about disputed charges in a timely manner.
- Notifying Purchasing Services of any changes in assignment or other changes that may impact the account.

Limits:

The default credit limit per card will be \$1,500 **per transaction** and \$5,000 **per month**.

A request to change the credit limit must be submitted to the Purchasing department by the school administrator or department manager, stating the reason(s) for the request.

Card cancellation/suspension:

Purchase cards are provided at the discretion of the Secretary Treasurer (or delegate) and may be revoked or suspended as deemed necessary, including for the following reasons:

- Change in cardholder employment status.
- Change in cardholder assignment status.
- Suspected misuse or fraudulent use of the account.
- Non-compliance with district policies and regulations.
- Lost or stolen card.

By signing below:

- The Employee agrees to all conditions, procedures, and responsibilities detailed above and in the **Purchasing Administrative Procedure**.
- The Budget Manager (Principal/Manager) grants the employee authorization to charge costs to their respective budget(s) and accepts responsibility for reviewing and approving the monthly transactions, receipts, and statements.

	Employee	Budget Manager	District Finance Authorization
Name			
Signature			
Date			

Once form is completed and signed by the Employee and the Budget Manager, please submit to Purchasing Services at the Board Office