

## Purchasing Card Change/Cancellation Form

This form is to be used when requesting changes to be made to an existing Purchasing Card or when requesting that an individual card account be canceled. Instructions for completing the form are listed below. Forms must be typed or written in legible handwriting.

### **Complete the following Cardholder Information:**

- Cardholder's Name as it appears on the card
  - Date; use current date
  - Last 4 digits of the 16-digit MasterCard card number
  - Check whether the card needs to be **Changed** or **Canceled**, if canceling state reason for cancellation
- \*NOTE: If a card needs to be canceled immediately, call your Purchasing Card Consultant within Procurement and then follow-up with this form.**

### **Requesting a CHANGE to Cardholder information/defaults:**

1. If changing the Cardholder's Name, fill in the Old Name and New Name, as it is to appear on the card. A new card will be sent to the Campus Procurement Services office. The cardholder will be notified when the card has arrived.
2. If changing the Cardholder Address information, fill in the Old Address and Phone Number and the New Address and Phone Number. A new card will not be issued.
3. Cardholder Controls for Card Usage can be modified. A Purchasing Card can be used for purchasing items on behalf of the University and/or for arranging Transportation for personnel within a department. The ability to make these charges is controlled by adding or removing certain Merchant Category Codes (MCC) to or from a card. If the ability to Purchase Items or pay for Transportation needs to be added or removed from a card, mark the appropriate box.
4. If the Single Purchase limit needs to be raised or lowered, enter the new limit in the Single Purchase field. The limit may not exceed \$5,000.
5. If the Billing Cycle limit, which is the monthly limit, needs to be raised or lowered, enter the new limit in the Billing Cycle field. The limit may not exceed \$15,000 without Procurement Approval. Send a letter of justification along with the request for increase if the amount is to exceed \$15,000.  
**\*NOTE: The \$15,000 Billing Cycle and \$5,000 Single Purchase limits are listed only as maximum amounts allowed. Departments are strongly urged to consider the purchasing needs of the individual cardholder and set limits accordingly.**
6. Card limits can be temporarily changed. If the changes to the limits should not be permanent, indicate the date that the old default amounts should resume.

### **Requesting a CHANGE or card CANCELLATION**

All forms **MUST** be signed by the Cardholder and the Approving Official and then sent to Procurement Services for final approval.

### **Requesting card CANCELLATION**

1. When sending in a form for card cancellation, include the card. If the cardholder has more than one card, cards will need to be listed on separate forms. (All Corporate Travel Card requests are to be sent to Accounting Services).
2. If a cardholder is moving from one department or campus to another within the University, this form should be used by the old department to have the cardholder's account cancelled. The new department should fill out a new Purchasing Card Application and Agreement form if the employee's new duties require a purchasing card.

### ***Additional changes not covered on the form:***

1. Approving Officials have access within PaymentNet to change default MoCodes and PS Accounts. These settings can be accessed through the Employee/User List under the Employee Profiles menu option.
2. If changes that impact hierarchy setup are occurring, i.e. Approving Official roles are changing for a department/cardholder or departments are consolidating or being renamed, contact your Purchasing Card Consultant within Procurement. These changes may impact several settings within PaymentNet.

# Purchasing Card Change/Cancellation Form

University of Missouri - Columbia  
113 Heinkel Bldg.  
Columbia, MO 65211  
(573) 882-3201

Cardholder's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Last 4 Digits of Card Number: \_\_\_\_\_

Card to be: Changed  Canceled  reason: \_\_\_\_\_

## NAME CHANGE

Old Name: \_\_\_\_\_

New Name: \_\_\_\_\_

## ADDRESS CHANGE

Old:

New:

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(City, State, Zip)

\_\_\_\_\_  
(City, State, Zip)

\_\_\_\_\_  
(Business Phone)

\_\_\_\_\_  
(Business Phone)

## CARD CONTROLS

*Card Usage Categories:*

Purchasing

Transportation

Add  Remove

Add  Remove

### *Credit Limits:*

Single Purchase \$ \_\_\_\_\_ (Not to Exceed \$5,000)

Billing Cycle \$ \_\_\_\_\_ (Not to Exceed \$15,000 without Procurement Approval)

If Card Limit changes are temporary, indicate date original defaults should resume: \_\_\_\_\_

\_\_\_\_\_  
(Cardholder Signature)

\_\_\_\_\_  
(Approving Official Signature)