

# Purchase Card Application Form

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Sections 1 & 2 must be completed in full. This information is collected for the purposes of approving, issuing and administration of the Purchase Card. In addition, applicants are required to be set up as a Finance One User or nominate an Administrator. If an Administrator is nominated, section 3 must also be completed.

(\* ) Denotes a required field. Press the Tab key to advance to the next field.

## 1. Personal Details

*(The information in this section is required by Westpac for the purposes of issuing the Purchase Card)*

<b>Title* (tick one):</b>	Dr   Mr   Ms   Prof   Other:												
<b>First Names*:</b>							<b>Surname*:</b>						
<b>How you want your name to appear on the card*:</b>													
<b>Date of Birth*<sup>1</sup>:</b>							<b>Mother's Maiden Name*:</b>						
<b>Job Title/Position*</b>													
<b>Phone No*:</b>							<b>Cell Phone No*:</b>						
<b>Email Address*:</b>													
<b>Required PCard Limit* (tick only <u>one</u> option):</b>	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000												

**IMPORTANT NOTE:** You **MUST** provide a certified copy of your photo ID. **Certified ID** = a photocopy of your driver's license, passport or firearms license that is signed by a Trusted Referee such as a Justice of the Peace, Chartered Accountant, Solicitor, or Westpac bank officer. Please refer to [www.westpac.co.nz/AML](http://www.westpac.co.nz/AML) for further information about Trusted Referees

## 2. Work Details:

*(The information in this section is required by University of Otago)*

<b>University User Name*:</b>					<b>University Employee No*:</b>				
<b>Manager's Name*:</b>					<b>Cost Centre*:</b>				
<b>Division Name*:</b>					<b>Department Name*:</b>				
<b>Default Account Code* (to divert uncoded transactions to):</b>									
<b>Reason for Card*:</b>									

## 3. Administrator Details

*(Optional –only complete if you will NOT be coding your own transactions)*

<b>Full Name:</b>				<b>Position:</b>			
<b>Email Address:</b>				<b>Phone No:</b>			
<b>Finance One User ID:</b>							

<sup>1</sup> The date of birth is used by Westpac as part of the identification process.



## Purchase Card Terms and Conditions of Use

- A University of Otago Purchase Card (“PCard”) will be issued on the express condition that the PCard holder will, at all times, take personal responsibility for the security and use of the PCard.
- If the PCard is lost or stolen it should be reported immediately to Westpac on 0800 888 111, the University of Otago PCard Administrator on 03 479 7686 or 03 479 8230 and the Cardholder’s Manager.
- Prior to ceasing employment with the University of Otago, the PCard holder must ensure all purchases are coded and approved before returning the PCard to the PCard Administrator, Accounts Payable Office, Financial Services Division (FSD).
- PCards are to be used to pay for goods and services, where expenditure is incurred on behalf of the University of Otago.
- Expenditure must be reasonable, appropriate and in accordance with the policies and procedures attached to all University of Otago-related expenditure.
- Expenditure must be supported by appropriate documentation.
- The use of PCards must be in accordance with Westpac’s MasterCard BusinessCard/PurchasingCard Conditions of Use.
- Expenditure on the PCard must not exceed the monthly card limit.
- The Pcard is a means of payment only. The use of a PCard in no way substitutes for appropriate purchase decision making and authorisation processes for entering into a commitment on behalf of the University.
- Any breach of Purchase policies or procedures may result in the cancellation of the PCard and possible disciplinary action.

## Confirmation of Identity

Westpac is, or may be, required to verify the identity of the new cardholder and certain other information provided in this form. Please refer to Westpac’s list of acceptable verification documentation available at [www.westpac.co.nz/AML](http://www.westpac.co.nz/AML).

## Acknowledgement

I acknowledge that I have read, understood and agree to adhere to the conditions set out above and in the University of Otago’s Purchase Card Policy, which govern the issue of a Purchase Card in my name.

The Purchase Card Policy is available at: <http://www.otago.ac.nz/administration/policies/otago003319>

I also understand that by completing this application I am providing personal information (‘this information’) about me which will be held securely by Westpac and its related companies. I certify that all this information supplied is true, correct and complete in every respect and understand that if it is not true, correct and complete, this application may be declined. I agree to be bound by the conditions in this application in addition to any other conditions of use that may be imposed by Westpac from time to time. By using MasterCard BusinessCard (‘the card’), I agree to be bound by the conditions of use accompanying the card. I have the right to access and correct this information subject to the provisions of the Privacy Act 1993.

<b>Signature of Applicant</b>	<b>Signature of Head of Department</b>
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**Full Name:**

**Full Name:**

**Date:**

**Date:**

<b>Signature of Head of Division</b>	<b>Signature of FSD Authorised Signatory</b>
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**Full Name:**

**Full Name:**

**Date:**

**Date:**

## Next Steps

Once this form has been completed and signed, it and your certified ID need to be returned to the PCard Administrator, Accounts Payables Office, Financial Services Division.

- Scan and email the completed and signed form and certified ID to: [pcard.admin@otago.ac.nz](mailto:pcard.admin@otago.ac.nz)