

## Procurement Card (Scotiabank) Application Form

The Procurement Card (Pcard) can be used for University-related off-campus purchases where the good or service (excluding travel and hospitality) is not available on eShop, is less than \$10,000 and where it is efficient and economical to do so. Travel and hospitality may be purchased using the [Travel Card program](#), or by submitting a [Travel & Expense claim](#).

The requester must complete this form in full and submit to [ProcurementServices@carleton.ca](mailto:ProcurementServices@carleton.ca) using their Carleton email account. Students must submit an application form annually by August 15, otherwise the Card will be suspended.

If the cardholder requires financial access to the indexes they will be reconciling to please request access through [FAAM](#).

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### Section 1 – Requester (Cardholder) Information

Full Name: \_\_\_\_\_

Banner ID#: \_\_\_\_\_

Position Title: \_\_\_\_\_

Department: \_\_\_\_\_

Carleton Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Birth Date (MM/DD/YY): \_\_\_\_\_

Primary Relationship Type: \_\_\_\_\_

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### Section 2 – Supervisor's Information

The Cardholder's supervisor will approve monthly statements as per the Signing Authorities and Procurement Card [policies](#).

Full Name: \_\_\_\_\_

Banner ID#: \_\_\_\_\_

Position Title: \_\_\_\_\_

Carleton Email: \_\_\_\_\_

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### Section 3 – Default Funding Source

The default Funding Source is the [FOAPAL](#) the Cardholder’s transactions will be allocated to if they do not complete the [reconciliation process](#) by the deadline(s) provided.

**For research, the default must be the faculty member’s Internally Restricted Research fund.**

Fund: \_\_\_\_\_

Org: \_\_\_\_\_

Account: \_\_\_\_\_

Activity Code (optional): \_\_\_\_\_

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### Section 4 – Acknowledgement & Approval

By signing below, the Requester (Cardholder) and their supervisor agree to comply with the Procurement and Procurement Card [policies](#) and related [procedures](#), including the requirement to complete reconciliations monthly.

#### 4.1 Requester (Cardholder) ([FAA](#) based on [FOAPAL](#) used for purchase)

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

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

#### 4.2 Departmental Approver

Eligible approvers are determined by the Procurement Card policy and the default funding source provided in Section 3 of this form.

For **research** funds, the application must be approved by the Funding Source Owner of the default funding source. For **departmental** funds, the application must be approved by the applicant’s Department Head (a Director, Chair, or equivalent).

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Date: \_\_\_\_\_ Signature: \_\_\_\_\_