

Research Procurement Card Application

Directions

1. Complete and print pages 1 and 2.
2. Email scanned copy of the completed form to ubs-rfpcard@buffalo.edu.

I. Cardholder Information

Name on Card: _____ **Title:** _____
(Individual who will do the purchasing with the card)

Signature: _____ **Date:** _____

Department Name: _____ **Address:** _____

Email: _____ **Phone Number:** _____ **Ext:** _____

UB Person Number: _____ **PI Name:** _____
(Displayed on the front of your UB Card)

Note: A reconciliation account will be established for the cardholder through the application process to provide a way to reconcile and certify the transactions electronically.

II. Account Information

Maximum single transaction limit \$2,500
Other: _____

Maximum \$10,000 total monthly limit
Other: _____

Designated Project-Task-Award

Project: _____ Task: _____ Award: _____ Template: (Office use only) _____

Project: _____ Task: _____ Award: _____ Template: (Office use only) _____

Project: _____ Task: _____ Award: _____ Template: (Office use only) _____

Name of individual responsible for paperwork/communication related to this account *(in addition to the cardholder or Principal Investigator)*

Name: _____ Title: _____

Phone: _____ Email: _____

III. Approvals

Unit Business Officer (UBO) Name: _____ UBO Signature: _____

Procurement Card Administrator Name: _____ PCard Admin Signature: _____

Sponsored Project Award Analyst Name: _____ SPS Award Analyst Signature: _____

Application will not be processed without a signed Approving Official Agreement (see page 2.)

Submit page 1 and 2 together. Incomplete or illegible applications will be returned.

Cardholder Applicant Name: _____

III. Authorization

APPROVING OFFICIAL AGREEMENT

University at Buffalo Research Foundation American Express Procurement Card Agreement Your use of an RF Procurement Card is subject to the following terms and conditions:

1. You are being entrusted with a valuable tool - a UB RF American Express Procurement Card which is to facilitate the purchase of project-related goods and services. An allowable/unallowable template will be distributed with the card or when additional projects are assigned to the card. Because you will be making a financial commitment on behalf of the University and the Research Foundation, you must strive to obtain the best value by following established purchasing policies as appropriate posted at ubbusiness.buffalo.edu. Purchases made during the last 30 days of a project period must be limited to emergency purchases required to complete the project.
2. All charges made to your credit card will be posted to a central bill by American Express and sent to your University's Card Program Administrator for payment. You will also receive a hard-copy bill from American Express. Cardholders will be responsible for reviewing monthly statements. Cardholders must also complete a monthly summary form, attach receipts, obtain Principal Investigator signature, and submit to Procurement Card Administration. This must be done within 15 days of receipt of the American Express statement which is mailed on or about the 1st of each month so that charges can be posted to the project in a timely manner. The monthly summary must describe each element of the expenditure (amount, date, place, business relation, purpose). Failure to submit this paperwork in a timely manner may result in revocation of your purchasing card. Disputes will be handled by the cardholder either directly with the supplier or reported to American Express for formal dispute.
3. You may use the purchasing card to pay for authorized transactions only. You may not use this credit card for personal charges or travel/entertainment expenses. Do not share your card number with anyone else in your department. Your University will audit the use of your card and take appropriate action on any discrepancies or unauthorized charges. All charges must comply with sponsor regulations. Any evidence that your card has been used fraudulently will require an investigation, after which disciplinary action may result. Fraudulent use may also result in criminal prosecution.
4. Cards can be cancelled without notice. This may be necessary if the cardholder violates the rules governing the use of the card, a project has terminated, the cardholder is no longer employed by the Research Foundation, or the card is lost or stolen. Any charges resulting from abuse become the personal liability of the cardholder/Principal Investigator.
5. You must follow the policies and procedures established by the University at Buffalo regarding the use of this credit card and the terms and conditions for American Express. Failure to do so may result in revocation of your user privileges or other disciplinary action, which could include termination of employment.
6. The RF American Express Procurement Cards are the property of American Express. You must return your card immediately upon request or upon termination of employment or retirement. Should there be any change in your employment status you must return this card and arrange to have a new card issued, if necessary.
7. If this credit card is lost or stolen, you must notify both your University's Card Program Administrator at 645-1346 and American Express at 1-800-492-4979 immediately.
8. You must comply with any changes to the terms and conditions or policies and procedures concerning use of this credit card.

As the employee receiving this card and the Principal Investigator authorizing this individual, I have read and understand these terms and conditions.

Cardholder Name: _____ Signature: _____ Date: _____

Principal Investigator Name: _____ Signature: _____ Date: _____

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