

Instructions for the *Request for Card/Card Detail Change Form (FIN 113)*

The Request for Card/Card Detail Change Form is to be used to apply for a Purchasing Card or to make changes to an existing Card.

The form should be completed by the Employee requesting the Purchasing Card and the Purchasing Card Coordinator. The form will provide the Purchasing Card Coordinator the information necessary to order the Purchasing Card through *BMO details Online*.

Employee (Cardholder) Information:

The employee's name and contact information should be provided. The Cardholder Number is only required if the request is to change existing card information. This section is to be completed in full and signed by the employee. Note, if this request is for a new purchasing card, the employee should also complete, sign and submit the Government Purchasing Card, Acknowledgement of Terms of Use and Consent (Terms of Use).

Authorization:

Authorization is normally provided by the Expense Authority to whose budget the cardholder's purchases will be charged. Where a cardholder's purchases are charged to several budgets, the Senior Financial Officer or Expense Authority that has applicable delegation over the budget areas should authorize the request.

The Purchasing Card Coordinator is to sign the form after reviewing the form for completeness, accuracy and the appropriate signatures.

Additional Account Set-Up Information:

The Reporting Unit (Hierarchy) Name and Hierarchy Number ('Reports To' profile) corresponds to the name and number where the cardholder 'reports to' based on the billing and reporting hierarchy structure established for the Ministry in the Bank of Montreal system.

Comments include instructions for the Bank when processing the card request such as changes to the default Ministry Merchant Category Code blocking or other information that will be required when the request is processed through *BMO details Online*.

The *Request for Card/Card Detail Change* form is to be retained by the Purchasing Card Coordinator as a registry of cardholders. The Employee (Cardholder) can retain a copy for their records.