INSTRUCTIONS FOR COMPLETING THE CARDHOLDER ACCOUNT FORM

Complete the Cardholder Account form to establish or update chartfields on the Procurement Card system.

**NEW**
1. Check the NEW option.
2. Complete the following:
   - Cardholder Name (24 Characters or less; will be embossed on the card)
   - Department Name
   - Street Address
   - City, State, Zip Code
   - Bldg Name
   - Employee ID Number
   - Date of Birth (you can make up any date that you will remember)
   - Password (make up a password that you will remember)
   - Default Account, Dept ID and Project/Grant (Tufts chartfields to be charged)
3. Go to Approval section and forward appropriate signatures.

**Cardholder Purchase Limits are preset if other is required contact Purchasing**

**CHANGE**
1. Check the Change option.
2. Complete the credit card account number.
3. Complete the Cardholder names and any other fields that require change.
4. Go to Approval section and forward appropriate signatures.

**DELETE/CLOSE**
1. Check the delete/close option.
2. Complete the credit card account number
3. Complete the Cardholder Name.
4. Cut the card in half and return to Purchasing Card Coordinator.

**APPROVALS**
1. Sign and date the form.
2. Forward the form to the Dept Manager, Dept Proxy, BFO/PI, and Sponsored Signatures (if applicable).
3. Send Completed Original form to:
   - Susan Gibson
   - Financial Services
   - T.A.B.
   - Medford Campus

It takes approximately 2-3 weeks from the time the application is sent to the bank to receive your card. Once the card is received, you will be contacted for training.