UD Credit Card Services

Use this form for all requests related to the UD Credit Card. This form can be initiated for yourself or for another UD employee. Updates to existing cards for multiple employees can be done using one form. The types of requests that can be made using this form are:

1. Access to Works (the employee is NOT required to have a UD credit card to get access to Works)
2. Request a New Card
3. Replenish a declining balance card
4. Update existing card
5. Cancel Card

If you have questions, contact Procurement at (302) 831-2159 or by email, creditcard@udel.edu.

Symbol key: * Required information, ! Error

Form originator

Originated by: Narayan, Abhrami Meyyappan (701614301)
Department: Procurement Services (4750)
Department address: 104 General Services Building
Department phone: * 302-831-2167 (use format nnn-nnn-nnn)

Request type

Requested for: *
- Myself
- Another employee
- Multiple employees (only for requesting updates to existing cards)

Type of request: *

Choose one
- Access to Works™
- New card
- Replenish declining balance card
- Update existing card(s)
- Cancel card

Next step
Steps to Request a New Credit Card:

Step 1: UD Web forms log in → Blanks → UD Credit Card Services

Scroll down the list to find

UD Credit Card Services
Wellness Activity Log: Individual
Wellness Activity Log: Team Captain
Winter Session Housing Registration

Step 2: The top section on the first page comes with the Originator’s information already filled in.
Step 3: Select Requested for - Myself or Another Employee. Multiple Employees choice is available only for Updating Existing Card(s). For Another Employee choice – type in the last name of the employee in the text box and pick from the available list.

Step 4: For Type of Request Select – New Card. Click Next Step.
Step 5: Choose an answer from the drop down for the question, “Does employee currently have a UD credit card?”

Step 6: Choose card type being requested from the drop down. Click next step.
Step 7:

For Card type – Procurement functionality

Fill in

1. Credit limit – cannot exceed $20,000
2. Single purchase limit – cannot exceed $5,000 and has to be lower than the credit limit
3. Procurement card administrator and Independent reviewer are required and cannot be the same person. Start typing in the Last name of the employee or use the magnifying glass to make the selection.
4. Procurement card administrator phone number is required
5. Reason for cash and/or card is needed is required
For Card type – Travel functionality

Fill in

1. Credit limit – cannot exceed $20,000
2. Single purchase limit – cannot exceed $5,000 and has to be lower than the credit limit
3. Travel card administrator and Independent reviewer are required and cannot be the same person. Start typing in the Last name of the employee or use the magnifying glass to make the selection.
4. Travel card administrator phone number is required
5. Reason for cash and/or card is needed is required

Card information

Card type being requested: Travel functionality

Credit limit: * Not to exceed $20,000.00

$ [ ] (use format nn.nn)

Single purchase limit: * Not to exceed $5,000.00

$ [ ] (use format nn.nn)

Travel card administrator: *

[ ]

Travel card administrator campus phone: * (use format nnn-nnn-nnnn)

[ ]

Independent reviewer: *

[ ]

Alternate approver:

[ ]

Reason for which cash and/or card is needed: *

[ ]
UD Credit Card Services – New Card

For Card type – Both procurement and travel functionality

Fill in

1. Credit limit – cannot exceed $20,000
2. Single purchase limit – cannot exceed $5,000 and has to be lower than the credit limit
3. Procurement card administrator and Independent reviewer are required and cannot be the same person. Start typing in the Last name of the employee or use the magnifying glass to make the selection.
4. Procurement card administrator phone number is required
5. Travel card administrator is not required. If a travel card administrator is not specified, the Procurement card administrator will act as the travel administrator also.
6. Reason for cash and/or card is needed is required

Card Information

Card type being requested: Both procurement and travel functionality

Credit limit: * Not to exceed $20,000.00
$ __________ (use format nn.nn)

Single purchase limit: * Not to exceed $5,000.00
$ __________ (use format nn.nn)

Procurement card administrator: *

Procurement card administrator campus phone: (use format nnn-nnn-nnnn)

Travel card administrator:

Travel card administrator campus phone: (use format nnn-nnn-nnnn)

Independent reviewer: *

Alternate approver:

Reason for which cash and/or card is needed:
For Card type – Declining balance card only

First fill in the card information and then fill in the declining balance card information

1. Credit limit – cannot exceed $20,000
2. Single purchase limit – cannot exceed $5,000 and has to be lower than the credit limit
3. Declining balance card administrator and Independent reviewer are required and cannot be the same person. Start typing in the Last name of the employee or use the magnifying glass to make the selection.
4. Declining balance card administrator phone number is required
5. Reason for cash and/or card is needed is required
For Declining balance card information – fill in

1. Choose an answer from the drop down for “Have you requested a declining balance card in the past?”
2. The Date funds are required
3. The Fund expiration date
4. The Total dollar amount should reflect the amount needed plus any remaining balance on the card.
5. The Percentage of total amount to be withdrawn as cash
Step 8: Funding

If you are going to provide the funding information

1. Select the choice that says “I will provide a SpeedType”
2. Then provide the SpeedType and Account. Click Next Step

If you are NOT providing the funding information

1. Select the choice that says “I will designate a funding originator”
2. Start typing in the Last name of the employee or use the magnifying glass to make the selection.
3. Click Next Step
Step 9: If you are requesting the card for yourself. The card terms and conditions will be displayed. Choose “I agree” from the drop down. Enter your First name and Last name in the respective text boxes.

If you are requesting the card for another employee, that employee will receive the form to accept the terms and conditions, when you click on finish and submit.
Step 10: Choose a Purpose Code Administrator from the drop down to approve the request. Additional Approvers are optional, not required. Click Finish and Submit.

Step 11: After the approval of the Purpose Code Administrator, the form is routed to the Credit Card web form basket for final approval.

Step 12: The Card Holder and the Card Administrator are automatically copied upon Final Approval of the form.