



UD Credit Card Services – Update Card

Procurement Services

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, Abirami Meyyappan (701814301)

Department: Procurement Services (4750)

Department address: 104 General Services Building

Department phone: * (use format nnn-xxx-xxxx)

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 ▶



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Steps to Cancel a Credit Card:

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

HELP BLANKS IN BASKET OUT BASKET ARCHIVE FOLDERS DRAFTS LOG OUT

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.

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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.

Request type

Requested for: Myself Another employee Multiple employees (or)

Type of request: *

- Kuhn II,Jeffry Stafford (700169672), Dining Services
- Kuhn,Mary E. (700506967), Procurement Services
- Kuhne,Phillip James (700111141), Univ Development

For updates to Multiple Employees on the same form

An Employee list can be attached or Employees can also be added individually – start typing the employees last name in the text box and select the employee from the list that comes up.

Use the green '+' button to bring up another row to add another employee

Cardholder information

If an entire department's name changed and needs to be updated, please contact Procurement at (302) 831-2159 or by email, creditcard@udel.edu.

Method of listing multiple cardholders: * You can add cardholders by either attaching a list or adding employees individually using the employee lookup.

I will use the employee lookup.
 I will attach a list.

Cardholders: *

Cardholder	Action
<input type="text" value="kuhn"/>	<input checked="" type="button" value="+"/> <input type="button" value="x"/>
<ul style="list-style-type: none"> Kuhn II,Jeffry Stafford (700169672), Dining Services Kuhn,Mary E. (700506967), Procurement Services Kuhne,Phillip James (700111141), Univ Development 	

Change department address:


Change department phone number:



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Use the red '-' button to remove an employee, if added by error

Cardholders: *	Cardholder	Action
	Kuhn, Mary E. (700506967)	

Step 4: For Type of request select – Update existing card.

Request type

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

Type of request: *

Available cards: *
Choose one
Access to Works™
New card
Replenish declining balance card
Update existing card(s)
Cancel card

Save & exit Exit without saving Next step ▶



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Step 5: Choose the credit card to be updated from the drop down. Then click Next Step.

Request type

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

Type of request:

Available cards: *
Choose one
*****1099
*****6868
*****3535
*****5454

Step 6: Campus address and phone number changes can be updated in the card holder information section

Cardholder information

If you would like to update the cardholder name due to a legal name change, please contact Procurement at (302) 831-2159 or by email, creditcard@udel.edu.

Cardholder name: Roeder, Kathy L (51248)

Department: Procurement Services
If you would like to change the department associated with your card, you must cancel the card and request a new card under the new department name.

Department address: 104 General Services Building
Change department address:

Department phone number: 302-831-2159
Change department phone number: (use format nnn-xxx-xxxx)



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Step 7: Credit limit, Single purchase limit, Card administrator and Independent reviewer changes can be updated in the card information section.


Card information

Last 4 digits of card number: 1099

Change credit limit: Not to exceed \$20,000.00
\$ (use format nn.nn)

Change single purchase limit: Not to exceed \$5,000.00
\$ (use format nn.nn)

Change card administrator: 

Change independent reviewer: 

Step 8: Default SpeedType and Account changes can be made in the funding section

Funding

SpeedType: PURC110000

Change SpeedType:

Account: 141000

Change Account:

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Step 9: If you are requesting updates to Funding information, you have to choose a Purpose Code Administrator for approval. Additional approvers are optional, not required.

Step 10: After the approval of the Purpose Code Administrator, the form is routed to the Credit Card web form basket for final approval.

Step 11: The form originator and the card holder are automatically copied upon Final Approval of the form.