

Guidance notes to completing your Unity Corporate Purchasing card Cardholder application form

The cardholder application form must be completed by any individual who will use a Unity Corporate Purchasing card.

For your convenience we have completed some sections on this form. Please do not change or amend these sections.

Make sure you provide all the information requested on this form. Any missing or incomplete information may lead to a delay in your application being processed.

Please check the correct form is being completed with CORP-0325 in the right hand corner, this must be displayed on all pages when returned to us.

Filling in your form

Section 1

Customer Data Privacy Notice

Complete this section in relation to the individual requiring a Unity Corporate Purchasing card.

Providing a staff number is optional.

Please make sure you provide an email address.

Mobile number is required to register online for the Strong Customer Authentication (SCA).

The cardholder name will appear in addition to the business or organisation name.

Section 2

Details of new customer/cardholder

All cardholder application forms must be signed and dated by the individual applicant.

Cardholder signature not required only details of cardholder are required for section 2.

Section 3

Line manager/Internal approval (this section is optional)

Section 4

Merchant Category Group blocking

Your Unity Corporate Purchasing card allows you full control of individual spending.

If you wish to block any merchant category for the individual cardholder, please indicate this here.

A full list of Merchant Category Groups, and what is included within each, can be found at www.unity.co.uk/corporate-purchasing-card/.

Note: Using the Online Card Management System, merchant category blocking can be managed at both organisation and cardholder level at any time by the Programme Administrator.

Section 5

Programme Administrator approval (for internal use only)

This **must** be completed by one of your business or organisation account Programme Administrators. Please leave the business account number and programme number blank unless known.

This must be signed by an existing PA.

In the event no existing PA's are no longer able to sign this the PA form will need to first be completed.

If the PA is able to sign, this will need to be signed in line with the Unity banking mandate.

Where a new PA needs to be nominated a new PA form will need to be completed to amend the facility.

Please provide the name and address of the new card holder.

The cardholder application should be signed in accordance with your Unity Trust Bank mandate or signed by the Programme administrator. Use the additional space on Page 3 of the form for additional signatures.

Section 6

Next Steps

Internal use only