

electronic Purchasing Card – Application form – Notes for completion

In order to help you with the application process ePC admin have pre-populated as much of the form as possible. However, there are certain fields which are mandatory and therefore require to be completed accurately to ensure the process is completed as quickly as possible (generally around 12 working days).

The details required are an absolute minimum by the bank in order for the card process to be satisfied. These details are secure and are not passed on to any third party.

While the form is completed by the card holder the request(s) need(s) to be submitted from the relevant card controller's mailbox and sent to:

mailto:epc_mailbox@gov.scot

The relevant financial information form will need to accompany the application. This can be found at: <https://beta.gov.scot/publications/electronic-purchasing-cards-guide-for-public-bodies/>

We would also recommend the use of the proxy arrangements set out in the ePC policy to ensure that card activity carries on uninterrupted during periods of leave planned, or otherwise; and to avoid the escalation arrangements coming into effect.

To note: the application does not need to be printed. Once both the application and the financial information form are complete these must be submitted electronically from the relevant card controller's mailbox to: mailto:epc_mailbox@gov.scot

Application form – found at: <https://beta.gov.scot/publications/electronic-purchasing-cards-guide-for-public-bodies/> - to be completed with the card holder's details

Section 1 Billing Unit details

No action – ePC admin only

Section 2 Cardholder details

Title: Insert.

First name: Insert

Middle names(s): Optional. If you wish your middle name or an initial on your card please enter your middle name. Please note this is not compulsory.

Surname: Insert

Name as you wish to appear on the card: Insert

Residential address to Postcode: Not applicable

Country of Residence: No action

Nationality of the cardholder: Insert

Date of birth: Insert

Preferred telephone/mobile number: Insert your work telephone number

Alternative telephone/mobile number: Not applicable

E-mail address: Insert your work email address

Security password: Insert. This can be anything but you could choose to use your staff number .

Correspondence address: Insert your usual place of work. For example, Address line 1 Area 3B South, Victoria Quay Address line 2 Edinburgh. Postcode EH6 6QQ.

Section 3 Cardholder details to be specified by the company/organisation.

Monthly credit limit required: Insert. This should equal one month's anticipated spend and it can be up to £25,000. However, it can be increased or decreased subject to business need. This can also be increased on request (from the card controller to the ePC admin mailbox) to allow larger payments to be made where it is considered that an ePC provides the most appropriate payment method.

Is a single transaction limit required: Pre-populated as "Yes"

If "Yes", how much? Insert. This can be up to £5,000. However, it can be increased on request (from the card controller to the ePC mailbox) to allow larger payments to be made. No action for the remainder of Section 3.

Section 4 How we will use and share your information

No action required, for information only

Section 5 Authorisation by the business/organisation

No action – for ePC administration only

Section 6 Business/organisation checklist and **Section 7** What to do next

No action – for ePC administration only

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No action – for ePC administration only

Page 6 Customer to retain

To retain for your own records if needed