



Request for Credit Card Exception

State Form 57377

INDIANA DEPARTMENT OF ADMINISTRATION

INSTRUCTIONS: Please complete the form in its entirety. Incomplete fields can lead to additional processing delays or denials. If you have a valid, approved blanket exception letter from IDOA Credit Card Services (CCS), please include it with the request. **Only APAs can submit completed forms to CCS.** Requests from cardholders will be denied.

*Complete the subject line to this email with exception need, first name, last name, last 4 digits of the card, and request
Example: MCC Joe Doe 1234 Virtual Conference

*Use this form for:

- One-time exception to the standard use of procurement, travel credit card (conference) MCC.
- Adjustment of an existing card's current Monthly Limit or Single Purchase Limit

*A new form must be submitted for each credit card, if applicable.

***Complete the justification section with all relevant details to avoid delays for more information.**

Please be advised that exception requests may take 24-48 hours or more for approval, depending on the nature of the request and the review process. Requests that need additional reviews (such as approvals from the State Budget Agency or the Indiana Office of Technology) may require additional time. Kindly consider this timeframe when submitting your request.

*Submit completed form and any relevant supporting documentation to Creditcardservices@idoa.in.gov

TYPE OF CARD

☐ Purchase Card (PCard)

☐ Travel Card (TCard)

CARDHOLDER INFORMATION

Cardholder Name (full name as embossed on card)

Last **four (4) digits** of Card Number

Date of Request

ONE-TIME EXCEPTION TO STANDARD CARD USE

Supplier Name

Dollar Amount of Purchase

Date of Purchase

Is this Supplier registered in Peoplesoft?

- ☐ No, and they are not willing to register
- ☐ Yes, but their account is Inactive or does not include the needed location / branch / remit address, and the Supplier is unwilling to provide an update
- ☐ Yes, but this specific transaction must be paid via credit card (list reason in **Explanation / Justification**)

Do you need a general MCC code added to the card?

☐ Yes ☐ No

If **out-of-state travel** is associated with this request, then has the trip been approved by the IDOA Travel Office? If yes, please add the TA number.

☐ Yes ☐ No TA number

ADJUSTMENT OF CARD LIMITS

☐ Monthly Limit (ML)

☐ Single-Purchase Limit (SPL)

Requested ML Dollar Amount

Requested SPL Dollar Amount

☐ **Temporary ML Adjustment**
 Requested ML Dollar Amount will reset to card's original ML at beginning of next billing cycle (unless a specific date for reset is provided in the Explanation and Justification section below)

☐ **Temporary SPL Adjustment**
 Requested SPL Dollar Amount will reset on the date specified in the email approval of this request and / or upon completion of the transaction

☐ **Permanent ML Adjustment**
 Requested ML Dollar Amount will become the card's new standard ML for all future billing cycles

☐ **Permanent SPL Adjustment**
 Requested SPL Dollar Amount will become the card's new standard SPL for all future transactions

EXPLANATION OF PRODUCT AND JUSTIFICATION FOR EXCEPTION

ADDITIONAL NOTES

- To purchase a QPA item from a non-QPA vendor, you first need to contact the IDOA Contract Manager for the QPA. The DPAP "cost savings" process needs to be followed. After the Contract Manager's approval, you may submit the credit card exception request. Please include the approval with the exception request.

- A competitive solicitation (procurement) method is required for all purchases of \$1,500 or more and begins after considering the QPAs, Indiana Correctional Industries and Ability Indiana defining the type of purchase.

APPROVAL

Agency Program Administrator (APA) Printed Name

Signature

Date (month / day / year)