

HOW TO APPROVE A PCARD APPLICATION

OVERVIEW:

This guide reviews how to approve an electronic PCard Application in myUFL for a new or updated PCard.

Note: Only primary and secondary financial approvers for UF GO have access to approve PCard Applications.

- To identify the financial approvers for your department, run the [UF GO Financial Approvers](#) report in [Enterprise Analytics](#).
- To add or update the financial approvers for your department, see the [UF GO Financial Approver Form](#) section of the [UF GO Forms & Resources website](#).

TO APPROVE A PCARD APPLICATION:

1. Sign in to myUFL
2. Navigate to [Main Menu > Financials > UF Financial Custom Apps > PCard Application](#)

3. Enter the criteria you wish to search by and click [Search](#). You can search by one or multiple fields.
 - a. To review a specific person's application, search by **Emp ID**, **Name**, and/or **Last Name**.

- b. To review all applications for a department, search by **Department**. Enter the 8-digit department ID or the first 4 digits for all department IDs in the business unit.

Empl ID: begins with []

Seq Number: = []

Name: begins with []

Last Name: begins with []

Application Status: = [Submitted for Approval]

Application Type: = []

Department: begins with []

- c. The **Application Status** is set to Submitted for Approval, so you will only see applications that are ready to review and approve.
 - i. If you wish to see applications with a different status, select one of the below options, or select the blank field to see applications with any status.
 1. **Approved:** approved by the PCard Team
 2. **Denied:** denied by the UF GO Financial Approver or PCard Team
 3. **Dept Approved:** approved by the UF GO Financial Approver
 4. **Initial:** created and saved, but not submitted
 5. **Processed Manually:** not in use at this time
 6. **Processed via File:** not in use at this time
 7. **Submitted for Approval:** submitted but not yet approved by the UF GO Financial Approver
- 4. If there is a single application that meets your search criteria, the application will load automatically. If there are multiple applications that meet your criteria, click on the application you wish to review from the list of Search Results.

▼ Search Results

2 results Application Status "Submitted for Approval"

Empl ID	Name	Last Name	Seq Number	Requested Date	Application Status	Application Type	Department	
12345678	Alligator, Albert	Alligator	1	07/22/2024	Dept Aprv	New	60733000	>
23456789	Alligator, Alberta	Alligator	1	08/13/2024	Dept Aprv	New	21030000	>

5. Review the application. Pay particular attention to the areas discussed below.
 - a. Applicant—individual should be in good standing with your department and have a need to make purchases and/or travel for official University business

PCard Application

Need Help? (Link will open in new tab.)

Empl ID 12345678 Alligator, Albert

Request Date 08/13/2024 Seq 1

Application Status Submitted for Approval

*Application Type **New**

Name Address
 Limit Transfer Department
 Card Type

Workflow Comments

Approve Deny

Documents (0)

Training Completed Date 01/12/2023 (Course UGO500)

Non Employee

*Name Albert Alligator First, MI, Last - or as the person signs their name

*Email Address i@ufl.edu

Title Program Assistant

Phone 352/123-4567

- b. UF Address—a UF address should be provided (cards should not be sent to home addresses)

UF address the card should be delivered to

*Country USA United States

*Address Line 1 PO BOX 115250

Address Line 2

*City GAINESVILLE

*State FL

*Postal Code 32611-5250

- c. Department—department ID in the **Department** field should match the department ID in the **Job Department** field, or a reasonable justification should be provided as to why they differ

*Department 21030000 CFO-PURCHASING SERVICES

Job Department 21030000

Justification if Departments (first four digits) differ

- d. Department Contact—should not be the cardholder (this is who will be contacted in the cardholder’s absence)

*Dept Contact Name
 *Dept Contact Email
 Dept Contact Phone

- e. Card Type and Spending Limit

- i. Drop-down selections should support the intended use of the card

Request Card Type Other Card Type
 Spending Limit Spend Limit Other

- ii. If one or both of the “Other” check boxes are selected, ensure the justification provided in the text box or the attachment indicates what other card type and/or limit is being requested and adequately justifies the request

Request Card Type Other Card Type
 For other enter justification here or attach a document

 Spending Limit Spend Limit Other
 For other enter justification here or attach a document

- 6. Approve or Deny the application

- a. To **Approve** the application, click the **Approve** button

PCard Application

Need Help? (Link will open in new tab.)

Empl ID 12345678 Alligator, Albert
 Request Date 08/13/2024 Seq 1
 Application Status Submitted for Approval
 *Application Type

Name Address
 Limit Transfer Department
 Card Type

Workflow Comments

- b. To **Deny** the application,
 - i. Write a comment in the **Workflow Comments** box explaining why the application is being denied

The screenshot shows the 'PCard Application' form. On the left, the application details are listed: Empl ID 12345678, Alligator, Albert; Request Date 08/13/2024, Seq 1; Application Status Submitted for Approval; *Application Type New (dropdown); and several checkboxes for Name, Address, Limit, Transfer Department, and Card Type. On the right, the 'Workflow Comments' text area is highlighted with an orange border. Below it, the 'Approve' and 'Deny' buttons are also highlighted with orange borders. A 'Documents (0)' button is located below the 'Deny' button.

- ii. Click **Deny**

This screenshot is identical to the previous one, but the 'Workflow Comments' box is now empty. The 'Deny' button remains highlighted with an orange border.

- 7. Confirm your action on the pop-up message by clicking **OK**

The screenshot shows a 'Message' dialog box with the text: 'Are you ready to [redacted] this application? (24000,150)'. The 'OK' button is highlighted with an orange border.

- Once approved or denied, the **Approve** and **Deny** buttons will no longer be visible, but the **Dept Approval** status will show **Pending** until the form is refreshed.

PCard Application

Need Help? (Link will open in new tab.)

Empl ID 12345678 Alligator, Albert

Request Date 08/13/2024 Seq 1

Application Status Submitted for Approval

Application Type New

Name Address

Limit Transfer Department

Card Type

Workflow Comments

Documents (0)

Dept Approval

EMPLID=73240810, SEQNUM=1: Pending

Department Approval

Pending

Multiple Approvers
UF PCard Dept Approvers

- When the form is reopened, the **Dept Approval** status will show **Approved** or **Denied**

Dept Approval

Dept Approval

EMPLID=73240810, SEQNUM=1: Approved

Department Approval

Approved

Heredia, Nicola

UF PCard Dept Approvers

08/13/24 - 9:53 AM

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives

Travel Office
352-294-1114
[Contact Form](#)

PCard Policies & Questions

PCard Team
352-392-1331
[Contact Form](#)