

## HOW TO ORDER A NEW PCARD

### OVERVIEW:

This guide reviews the process to request a new PCard for yourself or someone else using the electronic PCard Application form in myUFL.

**Note:** An application cannot be submitted until the applicant has completed the required training, **UGO500: What Every PCard Holder Needs to Know**. The training should be retaken every 2 years.

### TO SUBMIT AN APPLICATION FOR A NEW PCARD:

1. Sign in to myUFL
2. Navigate to **Main Menu > My Self-Service > UF GO PCard Application**
3. Click **Add a New Value**

The screenshot shows the 'PCard Application' search interface. At the top right, there is a button labeled '+ Add a New Value'. Below this is a section titled 'Find an Existing Value' with a dropdown arrow and the text 'Search Criteria'. A note below says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu and an edit icon. The main search area contains several fields: 'Empl ID:' with a 'begins with' dropdown and a search input field; 'Seq Number:' with an '=' dropdown and an input field; 'Name:' with a 'begins with' dropdown and an input field; 'Last Name:' with a 'begins with' dropdown and an input field; 'Application Status:' with an '=' dropdown and a selection dropdown; 'Application Type:' with an '=' dropdown and a selection dropdown; and 'Department:' with a 'begins with' dropdown and an input field. Below these fields is a link 'Show fewer options' and a checkbox for 'Case Sensitive'. At the bottom are 'Search' and 'Clear' buttons.

- 4. The form will prepopulate with your UFID in the Empl ID field
  - a. If submitting an application for yourself, click **Add**

PCard Application

Add a New Value Find an Existing Value

\*Empl ID: 12345678

Seq Number: 1

**Add**

- b. If submitting an application on behalf of someone else, delete your UFID and enter the UFID of the person for whom you are submitting
      - i. If you don't know the person's UFID, search for it by clicking on the magnifying glass to the right of the field.

PCard Application

Add a New Value

\*Empl ID:

Seq Number: 1

**Add**

- ii. Enter the criteria you want to search with, i.e., last name and first initial, and click **Look Up**

Look Up Empl ID Help

Empl ID: begins with

Last Name: begins with alligator

First Name: begins with a

**Look Up** Clear Cancel Basic Lookup

Search Results

View 100First 1 of 1 Last

| Empl ID  | Last Name | First Name |
|----------|-----------|------------|
| 23456789 | Alligator | Albert     |

iii. Click on the person's Empl ID

Look Up Empl ID

Empl ID: begins with [ ]

Last Name: begins with alligator

First Name: begins with a

Look Up Clear Cancel Basic Lookup

Search Results

View 100First 1 of 1 Last

| Empl ID  | Last Name | First Name |
|----------|-----------|------------|
| 23456789 | Alligator | Albert     |

iv. Click **Add**

PCard Application

Add a New Value

\*Empl ID: 23456789

Seq Number: 2

Add

5. Verify the **Training Completed Date** is populated

- a. The application **cannot** be submitted until the applicant has taken **UGO500: What Every PCard Holder Needs to Know**

PCard Application

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

Empl ID 23456789 Alligator, Albert

Request Date 05/28/2024 Seq 3

Application Status Initial

\*Application Type [ ]

Name  Address

Limit  Transfer Department

Card Type

Training Completed Date 01/11/2023 (Course UGO500)

- b. If the **Training Completed Date** field is blank, take or have the applicant take the training. Once completed, it requires an overnight process before it will show on the application.
- 6. From the **Application Type** drop-down menu, select **New**

The screenshot shows the 'PCard Application' form. Fields include: Empl ID 23456789, Alligator, Albert; Request Date 05/28/2024, Seq 3; Application Status Initial. The '\*Application Type' dropdown menu is open, showing options: 'New' (highlighted with an orange box) and 'Update'. Other partially visible fields include 'ss' and 'fer Department'.

- 7. If the application is for a **Non-Employee**, the department will need to create a POI Type 00017 – UF GO Associate prior to creating the application. See the instruction guide on [Creating a Person of Interest \(ufl.edu\)](#).
  - a. If the UF ID of the applicant is associated with a POI Type 00017, the **Non Employee** check box will automatically be checked.

A close-up of the 'Non Employee' checkbox, which is currently unchecked. Below it is a text input field labeled 'Name'.

- b. An additional form will need to be attached. [Contact the PCard Team](#) for more information.
- 8. Fill in the fillable fields. You can **Save** the application using the button at the bottom left of the page if you need to stop and return to it later.
  - a. **Name:** how the cardholder’s name will appear on the card
    - i. If possible, this should match the name in Job Data (listed on the top of the application)
    - ii. The field is limited to 21 characters

The screenshot shows the 'PCard Application' form with several fields highlighted with orange boxes: 'Alligator, Albert' in the name field, 'New' in the Application Type dropdown, and the '\*Name' input field. Other fields include: Empl ID 23456789, Request Date 05/28/2024, Seq 3, Application Status Initial, Training Completed Date 01/11/2023 (Course UGO500), and a 'Non Employee' checkbox. Buttons for 'Submit for Approval' and 'Documents (0)' are also visible.

b. **Phone:** Cardholder's phone

**PCard Application**

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

Empl ID 23456789 Alligator, Albert

Request Date 05/28/2024 Seq 3

Application Status Initial

\*Application Type **New**

Name  Address

Limit  Transfer Department

Card Type

Training Completed Date 01/11/2023 (Course UGO500)

Non Employee

\*Name

\*Email Address

Title Program Assistant

**Phone**

- c. **UF address the card should be delivered to:** mailing and billing address for the card
  - i. Prepopulates the UF address associated with the person's department in Job Data
  - ii. Verify the address is correct or change it to a different UF address

**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**

- d. **Department:** the department ID associated with the cardholder
  - i. The application will route for approval to the UF GO Financial Approver associated with this department ID

\*State **FL**

\*Postal Code **32611-5250**

**\*Department**

e. **Justification if Departments (first four digits) differ**

- i. If applicable, explain why a different department ID was entered in the **Department** field than what appears in the **Job Department** field

\*Department

Job Department 210

Justification if Departments (first four digits) differ

f. **Dept Contact Name:** who should be contacted in the cardholder's absence

g. **Dept Contact Email:** UF email

h. **Dept Contact Phone**

\*Dept Contact Name

\*Dept Contact Email

Dept Contact Phone

i. **Request Card Type:** select one of the following options from the drop-down menu

\*Dept Contact Name

\*Dept Contact Email

Dept Contact Phone

**Request Card Type**

Other Card Type

- i. Commodities: the card can only be used to purchase supplies and services
- ii. Commodities and Travel: the card can be used to purchase supplies, services, and allowable travel expenses for official UF business
- iii. Gas Only: the card can only be used to purchase gasoline for UF, State, and rental vehicles. Spending limits are \$100 single/\$500 cycle
- iv. If a card type not in the above drop-down menu options is needed, click the check box next to Other Card Type to the right of the drop-down menu

Request Card Type

Other Card Type

- 1. The other card types require a justification, which can be added in one of two ways:
  - a. Type it in the comment box (appears after the check box is selected), or

Request Card Type   Other Card Type

For other enter justification here or attach a document

- b. Attach a justification letter to the application
  - i. Click the **Documents** button to attach via OnBase

The screenshot shows the 'PCard Application' form. At the top right, there is a 'Submit for Approval' button. Below it, the 'Documents (0)' button is highlighted with an orange border. The form also displays fields for 'Empl ID', 'Request Date', 'Application Status', and '\*Application Type' with several checkboxes for 'Name', 'Address', 'Limit', 'Transfer Department', and 'Card Type'.

- j. **Spending Limit:** select one of the options from the drop-down menu

The screenshot shows a dropdown menu for 'Spending Limit' with the following options:
 

- a. \$100 single/\$500 cycle
- b. \$500 single/\$1,000 cycle
- c. \$500 single/\$2,500 cycle
- d. \$1,000 single/\$2,500 cycle
- e. \$1,000 single/\$5,000 cycle
- f. \$2,000 single/\$5,000 cycle
- g. \$2,000 single/\$10,000 cycle

 To the right of the dropdown menu, the 'Spend Limit Other' checkbox is highlighted with an orange box. Other form fields like '\*Dept Contact Name' and '\*Dept Contact Email' are also visible.

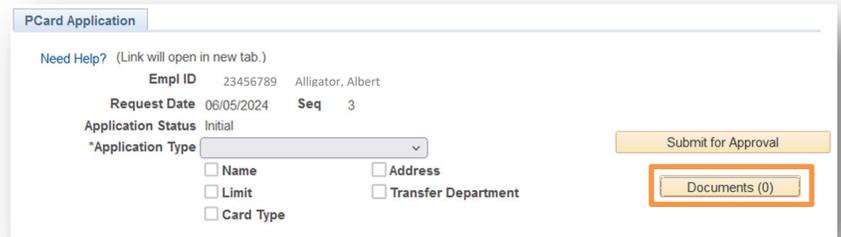
- i. The single transaction limit is the maximum allowed amount for a single transaction
- ii. The cycle limit is the amount allowed per week (UF's cycle is Wednesday-Tuesday)
- iii. If a spend limit not in the above drop-down menu options is needed, click the check box next to Spend Limit Other to the right of the drop-down menu

This screenshot shows the 'Spending Limit' dropdown menu and the 'Spend Limit Other' checkbox, both highlighted with orange boxes. The dropdown menu is currently empty, and the checkbox is unchecked.

- 1. Other spend limits require a justification, which can be added in one of two ways:
  - a. Type it in the comment box (appears after the check box is selected), or

The screenshot shows the 'Spend Limit Other' checkbox selected with a blue checkmark. Below it, a text area for justification is highlighted with an orange border. The text area contains the prompt: 'For other enter justification here or attach a document'.

- b. Attach a justification letter to the application
  - i. Click the **Documents** button to attach via OnBase



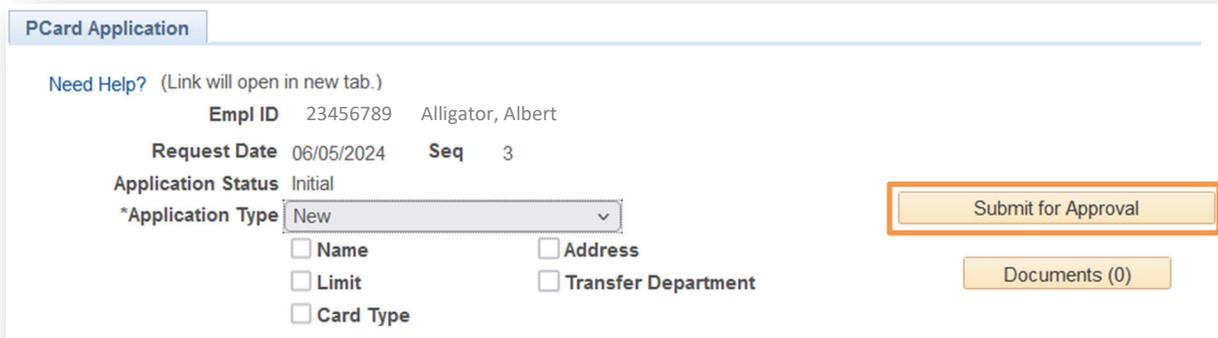
The screenshot shows the 'PCard Application' form. At the top, there is a 'Need Help?' link. Below it, the user information is displayed: 'Empl ID 23456789 Alligator, Albert'. The 'Request Date' is '06/05/2024' and the 'Seq' is '3'. The 'Application Status' is 'Initial'. The '\*Application Type' is set to a dropdown menu. Below this, there are several checkboxes: 'Name', 'Address', 'Limit', 'Transfer Department', and 'Card Type'. On the right side, there is a 'Submit for Approval' button and a 'Documents (0)' button, which is highlighted with an orange border.

- 9. If you need to return to the application later, click **Save**



The screenshot shows a portion of the 'PCard Application' form. It displays two dropdown menus: 'Request Card Type' set to 'Commodities and Travel' and 'Spending Limit' set to 'f. \$2,000 single/\$5,000 cycle'. Below these, there is a 'Save' button with a floppy disk icon, which is highlighted with an orange border.

- 10. When the application is ready to submit, click **Submit for Approval** to route the application to the approver



The screenshot shows the 'PCard Application' form. It displays the same user information as the previous screenshot: 'Empl ID 23456789 Alligator, Albert', 'Request Date 06/05/2024', and 'Seq 3'. The 'Application Status' is 'Initial'. The '\*Application Type' is set to 'New'. Below this, there are several checkboxes: 'Name', 'Address', 'Limit', 'Transfer Department', and 'Card Type'. On the right side, there is a 'Submit for Approval' button and a 'Documents (0)' button. The 'Submit for Approval' button is highlighted with an orange border.

## FOR ADDITIONAL ASSISTANCE

### Technical Issues

The UF Computing Help Desk  
352-392-HELP  
[helpdesk.ufl.edu](http://helpdesk.ufl.edu)

### Travel Policies and Directives

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

### PCard Policies & Questions

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