

HOW TO UPDATE AN EXISTING PCARD

OVERVIEW:

This guide reviews the process to update an existing 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 TO UPDATE AN EXISTING 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' interface. At the top right, there is a button labeled '+ Add a New Value'. Below this is the 'Find an Existing Value' section, which includes a 'Search Criteria' dropdown and a prompt: '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 a search input field; 'Name:' with a 'begins with' dropdown and a search input field; 'Last Name:' with a 'begins with' dropdown and a search input field; 'Application Status:' with an '=' dropdown and a search input field; 'Application Type:' with an '=' dropdown and a search input field; and 'Department:' with a 'begins with' dropdown and a search input field. Below these fields is a 'Show fewer options' link and a 'Case Sensitive' checkbox. At the bottom of the search area 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 **Update**

The screenshot shows the 'PCard Application' form. At the top, there is a 'Need Help?' link. Below that, the 'Empl ID' is 23456789 for 'Alligator, Albert'. The 'Request Date' is 05/28/2024 and the 'Seq' is 3. The 'Application Status' is 'Initial'. The '*Application Type' dropdown menu is open, showing 'New' and 'Update' options. The 'Update' option is highlighted with an orange box. To the right of the dropdown, the text 'Transfer Department' is partially visible.

- 7. Click the check box by the option(s) that need(s) to be updated. Select all that apply.

This close-up shows the '*Application Type' dropdown set to 'Update'. Below it, there are five checkboxes: 'Name', 'Address', 'Limit', 'Transfer Department', and 'Card Type'. All these checkboxes are currently unchecked. An orange box highlights the entire checkbox area.

- a. The form will only allow certain fields to be updated if they are checked in this section. This is to reduce data entry for the user and timely crosschecking by the core office.
- 8. Fill in the fillable fields associated with your update selection(s).
 - 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)
 - 1. If name legally changed, please ensure it is updated in Job Data before submitting an updated PCard application.
 - ii. The *Name field is limited to 21 characters
 - iii. The *Name field is only fillable if the “Name” box above it is checked

This screenshot shows the form after the 'Name' checkbox has been checked. The '*Application Type' dropdown is still set to 'Update'. The 'Name' checkbox is now checked with a blue checkmark. Other checkboxes for 'Address', 'Limit', 'Transfer Department', and 'Card Type' remain unchecked. To the right, there are buttons for 'Submit for Approval' and 'Documents (0)'. Below the checkboxes, there is a 'Training Completed Date' field with '(Course UGO500)' next to it, and a 'Non Employee' checkbox. At the bottom, the '*Name' field is highlighted with an orange box, and the text 'First, MI, Last - or as the person signs their name' is visible to its right.

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

Name First, MI, Last - or as the person signs their name
*Email Address @ufl.edu
Title MGR, Administrative Services
Phone

c. **UF address the card should be delivered to:** mailing and billing address for the card

i. This field is only fillable if the "Address" box above it is checked

*Application Type Update
 Name Address Limit Transfer Department
 Card Type
Training Completed Date (Course UGO500)
 Non Employee
Name First, MI, Last - or as the person signs their name
*Email Address @ufl.edu
Title MGR, Administrative Services
Phone
UF address the card should be delivered to
*Country USA United States
*Address Line 1
Address Line 2
*City
*State
*Postal Code

d. **Department:** the department ID associated with the cardholder

i. This field is always fillable, as it is associated with the UF GO Financial Approver

*State FL
*Postal Code 32611-5250
*Department

- ii. The department associated with the card will **not** be changed unless the Transfer Department box is checked.

Application Status: Initial
 *Application Type: Update
 Name Address
 Limit Transfer Department
 Card Type

- iii. If the Transfer Department box is checked, please wait until the prepopulated Job Department has updated to the new department **before submitting** the updated application

*Department []
 Job Department 21030000

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:**

i. This field will only be changeable if the Card Type box is checked.

A screenshot of a web form. At the top, 'Application Status' is set to 'Initial'. Below it, '*Application Type' is a dropdown menu with 'Update' selected. There are four checkboxes: 'Name', 'Address', 'Limit', and 'Transfer Department', all of which are unchecked. The 'Card Type' checkbox is checked and highlighted with an orange border.

ii. If checked, select one of the following options from the drop-down menu

A screenshot of the 'Request Card Type' dropdown menu. The menu is open, showing four options: 'Commodities', 'Commodities and Travel', 'Gas Only', and 'Other Card Type'. The 'Request Card Type' label and the dropdown arrow are highlighted with an orange border. To the right of the dropdown is an unchecked checkbox labeled 'Other Card Type'.

- iii. Commodities: the card can only be used to purchase supplies and services
- iv. Commodities and Travel: the card can be used to purchase supplies, services, and allowable travel expenses for official UF business
- v. Gas Only: the card can only be used to purchase gasoline for UF, State, and rental vehicles. Spending limits are \$100 single/\$500 cycle
- vi. Other Card Type: 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

A screenshot of the 'Request Card Type' form. The 'Request Card Type' dropdown menu is closed. The 'Other Card Type' checkbox is checked and highlighted with an orange border.

- 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

A screenshot of the 'Request Card Type' form. The 'Request Card Type' dropdown menu is closed. The 'Other Card Type' checkbox is checked. Below it is a text box with the placeholder text 'For other enter justification here or attach a document'. The text box is highlighted with an orange border.

- 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, a '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', 'Card Type', and 'Transfer Department'.

- j. **Spending Limit:**
 - i. This field will only be changeable if the Limit box is checked

This close-up shows the '*Application Type' dropdown menu set to 'Update'. The 'Limit' checkbox is checked and highlighted with an orange box. Other checkboxes for 'Name', 'Address', 'Transfer Department', and 'Card Type' are visible but unchecked.

- ii. Select one of the options from the drop-down menu

The screenshot shows the 'Spending Limit' dropdown menu open, displaying seven options (a-g) ranging from '\$100 single/\$500 cycle' to '\$2,000 single/\$10,000 cycle'. The dropdown menu is highlighted with an orange border. Other form fields like '*Dept Contact Name' and '*Dept Contact Email' are partially visible.

- 1. The single transaction limit is the maximum allowed amount for a single transaction
- 2. 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 Spend Limit Other check box.

This close-up shows the 'Spending Limit' dropdown menu and the 'Spend Limit Other' checkbox. Both are highlighted with orange boxes to indicate they are the focus of the instruction.

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

A screenshot of a web form. At the top, there is a dropdown menu labeled 'Spending Limit' and a checked checkbox labeled 'Spend Limit Other'. Below this, there is a text area with the placeholder text 'For other enter justification here or attach a document'. The text area is highlighted with an orange border.

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

A screenshot of the 'PCard Application' form. It displays fields for 'Empl ID' (45595360), 'Request Date' (06/05/2024), and 'Seq' (3). There is a dropdown for 'Application Status' (Initial) and another for '*Application Type'. Below these are several checkboxes: 'Name', 'Address', 'Limit', 'Transfer Department', and 'Card Type'. A 'Submit for Approval' button is visible on the right. A 'Documents (0)' button is highlighted with an orange border.

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

A screenshot of a form section. It shows a dropdown for 'Request Card Type' set to 'Commodities and Travel' and another dropdown for 'Spending Limit' set to 'f. \$2,000 single/\$5,000 cycle'. A 'Save' button with a floppy disk icon 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

A screenshot of a form section. It shows 'Request Date' (07/02/2024), 'Seq' (1), and 'Application Status' (Initial). The '*Application Type' dropdown is set to 'Update'. Below are checkboxes for 'Name' (checked), 'Address', 'Limit', 'Transfer Department', and 'Card Type'. A 'Submit for Approval' button is highlighted with an orange border. A 'Documents (0)' button is also visible.

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](#)