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**

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

   b. If submitting an application <u>on behalf of someone else</u>, 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.

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

iii. Click on the person's Empl ID

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

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**

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

   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

b. **Phone**: Cardholder's 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

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

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

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

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

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

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

h. **Dept Contact Phone**

i. **Request Card Type**:

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

Application Status	Initial
*Application Type	Update

☐ Name ☐ Address
☐ Limit ☐ Transfer Department
☑ Card Type

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

*Dept Contact Name
*Dept Contact Email
Dept Contact Phone
Request Card Type

Commodities
Commodities and Travel
Gas Only

☐ 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

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

    j. **Spending Limit**:

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

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

             1. The <u>single</u> transaction limit is the maximum allowed amount for a single transaction

             2. The <u>cycle</u> 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 <u>Spend Limit Other</u> check box.

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

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

9. If you need to <u>return to the application later</u>, click **Save**

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

For Additional Assistance

Technical Issues	**Travel Policies and Directives**	**PCard Policies & Questions**
The UF Computing Help Desk	Travel Office	PCard Team
352-392-HELP	352-294-1114	352-392-1331
helpdesk.ufl.edu	Contact Form	Contact Form