

UNIVERSITY *of* FLORIDA



TRAVEL & PCARD SYSTEM

Electronic PCard Application

August 20, 2024

AGENDA

- Housekeeping
- Why change?
- Application Highlights
- Approver Workflow
- Instruction Guides
- Demo



HOUSEKEEPING

- Slides
- Recording
- Questions



Why Change?

IMPROVED EASE OF USE

- Easy navigation in myUFL
 - Main Menu > My Self Service > PCard Application
- Pre-loads information:
 - Training completion date
 - Email
 - Title
 - UF Address
- Routes for approval upon submission



MORE EFFICIENT PROCESSING

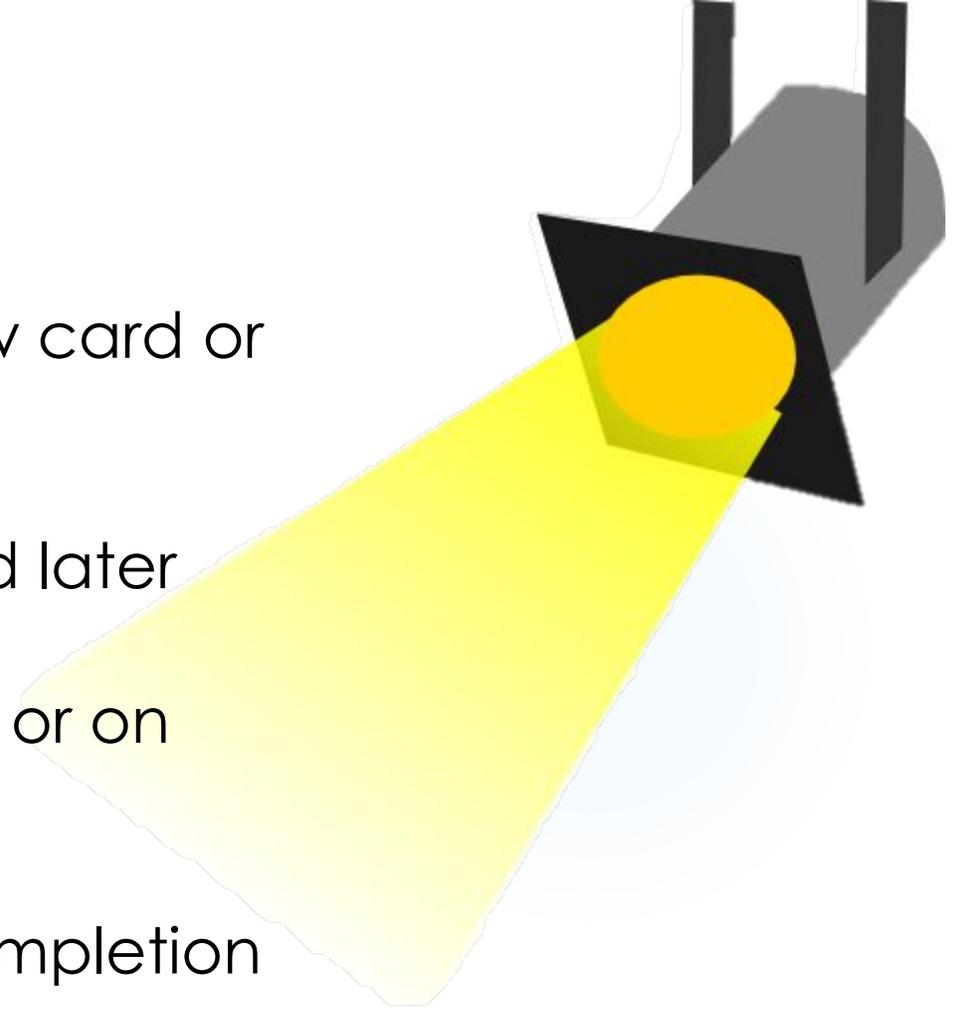


- Required fields cannot be omitted
- Reduced need for manual data verification
- Eliminates need for approver verification

Application Highlights

APPLICATION HIGHLIGHTS

- One application: used to request a new card or to update an existing card
- Can be started, saved, then completed later
- Submitted by the applicant themselves or on their behalf
- Submission is dependent on training completion
- Provides visibility into approver workflow



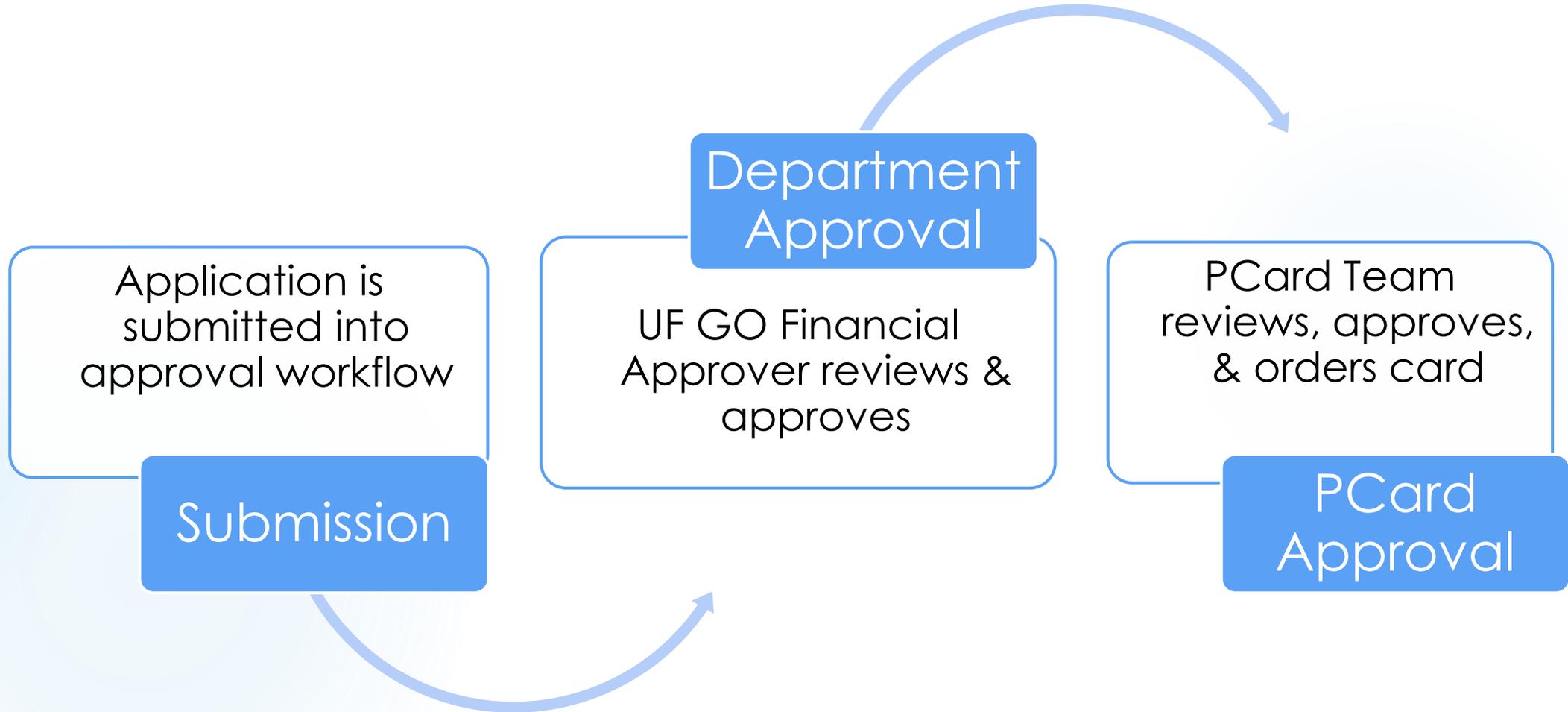
EMAIL NOTIFICATIONS

- myUFL sends notifications to:
 - The person who submits the application when an application is:
 - Submitted
 - Denied
 - Approved by the PCard Team
 - The department approver when an application is:
 - Submitted requiring approval
 - Denied by the PCard Team



Approver Workflow

APPROVAL WORKFLOW



DEPARTMENT APPROVERS

- Application routes to the Primary & Secondary UF GO Financial Approvers for the Department ID entered on the application
 - Both approvers have access to action (approve/deny) the app
 - Only one approver can action per application
 - Approvers cannot action their own applications (submissions & as cardholder)
- Delegate Approvers in UF GO do **not** have access to action applications



PCARD TEAM APPROVALS

- PCard Team Reviews:
 - Content
 - Address
 - Department
 - Card type
 - Spending limit



PCARD TEAM APPROVALS



- If revision is needed:
 - Application denied
 - Comment provided explaining why

- If application is accepted:
 - Card ordered with the bank
 - Application approved in myUFL
 - Welcome Email sent to cardholder



Instruction Guides

INSTRUCTION GUIDES

Four guides on how to:

1. Apply for New PCard
2. Update Existing PCard
3. Check PCard Application Status
4. Approve PCard Application



INSTRUCTION GUIDES - LOCATION

UF GO Toolkits: Expense: PCard: Electronic PCard Application

- <https://hr.ufl.edu/professional-development/toolkits/uf-go-toolkit/expense/>

PCard

- [Create and Submit a PCard Only Expense Report](#) 
- [Managing Travel Expense Reports When You Book Travel on Your PCard for Other Employees](#) 
- [Expensing a Travel Purchase on Behalf of a Traveler](#) 
- [How to Process Personal/Non-allowable Expenses on a PCard ONLY Report](#) 

Electronic PCard Application

- [Apply for New PCard](#) 
- [Update Existing PCard](#) 
- [Check PCard Application Status](#) 
- [Approve PCard Application](#) 

Demo

Questions?

CONTACT US!

Contact Form: [PCard and Travel Support](#)

UF Travel Department: 352-294-1114

UF PCard Team: 352-392-1331

We are happy to help!

