

UNIVERSITY *of* FLORIDA



TRAVEL & PCARD SYSTEM

PCard

Temporary Limit Increases & Exceptions

03/12/2025

AGENDA

- Housekeeping
- When needed?
- What to know before submitting
- Workflow
- Demo
- Questions

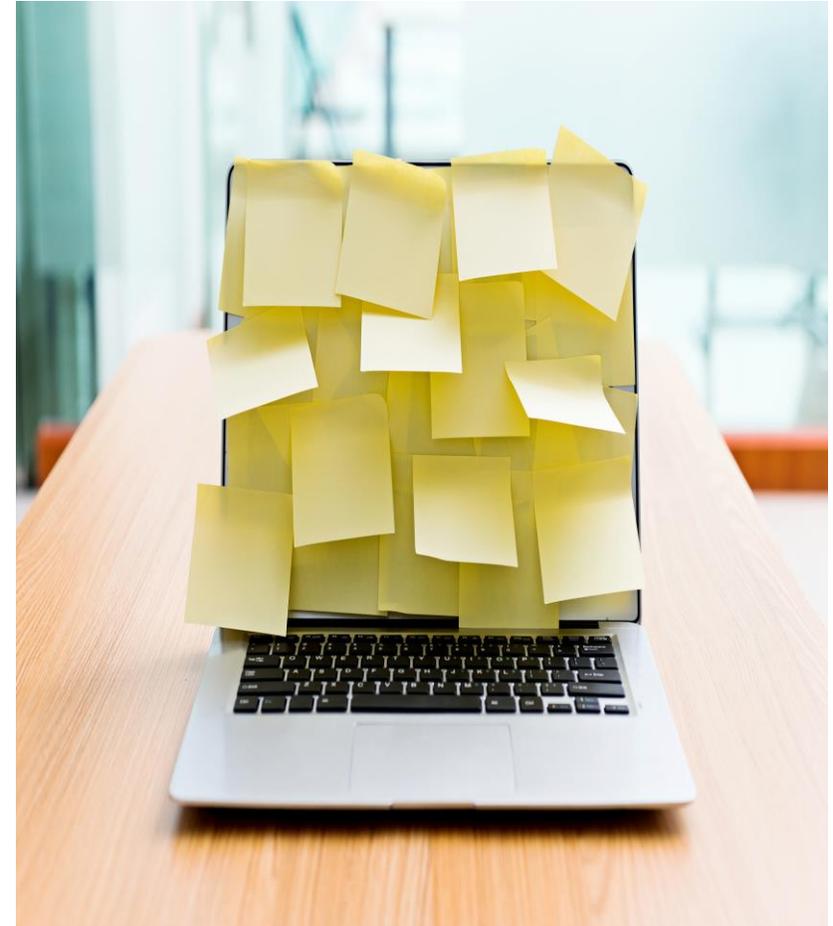
HOUSEKEEPING

- Slides
- Recording
- Questions



REMINDERS

- All PCard transactions require a receipt
 - Including travel charges under \$25, e.g., ground transportation
- Card sharing is misuse:
 - A PCard should not be added to someone else's UF GO profile
 - PCard holders should not give their card number to another employee to book travel



**When are Temporary
Limit Increases
and Exceptions needed?**

PCARD LIMITS

- Single purchase limit
- Cycle limit (Wednesday to Tuesday)

- 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

➤ **No** daily or monthly spend limits

SCENARIOS REQUIRING INCREASES/EXCEPTIONS

- Temporary Limit Increases
 - Exceeds single transaction limit
 - Exceeds cycle limit
- Exceptions
 - Blocked Merchant Category Code (MCC)
 - E.g., clothing stores, restaurants, etc.
 - Conditional/Unallowable purchases
 - E.g., alcohol



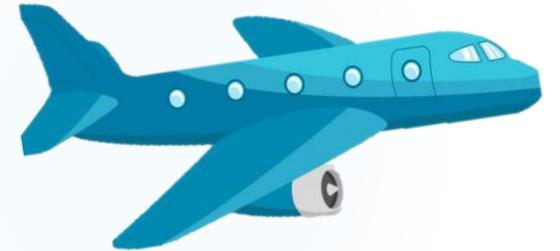
AIRFARE

The Air Card is available for use by all UF GO profiled Users

The screenshot shows the SAP Concur Travel interface. At the top, there are navigation tabs for Travel, Arrangers, Trip Library, Templates, and Tools. A message bar indicates to select a frequent flyer account for a personalized seat map. The main section is titled "Review and Book" and is divided into two columns. The left column, "Flight Itinerary", shows a round-trip for Monday, June 2, 2025, from Gainesville, FL (GNV) to Washington, DC (IAD), and Friday, June 13, 2025, from Washington, DC (IAD) to Gainesville, FL (GNV). Both flights are Delta and include "More Preferred" and "Select Seats" buttons. The right column, "Estimated Total Cost", shows a total of \$595.00, broken down into Base Fare (\$506.98) and Taxes, fees & charges (\$88.02). Below this is a "Payment" section with a "Form of Payment" dropdown menu, which is highlighted with an orange box and shows "Select a payment" with a downward arrow. Underneath, it says "Accepted for Booking" and lists "AirCard Group **** 2879 - 6/2027".

AIRFARE

- Benefits to using the UF GO Air Card:
 - A “ghost” payment card that is available on all UF GO profiled user’s accounts
 - Reduces financial burden for traveler
- If a flight isn't available in UF GO, call World Travel Service to book the flight
- Airfare can be booked with a PCard, but the Air Card is recommended



What to Know Before Submitting

PROHIBITED/ NEEDS APPROVAL

- On-Campus Catering
- Countries of Concern
- Travel directives must be followed
 - A PCard approval does not supersede Travel Directives
- Procurement Directives must be followed
 - Expenses that are \$5k or more require a PO, unless there is a justification for making the purchase with a PCard
 - Contracts & Agreements that require signature must be signed by a member of the Procurement team before PCard can approve an increase [Using the Agreement Intake Form in myUF Marketplace](#)

PROHIBITED/ NEEDS APPROVAL

- Building & construction related
[Request a Project » Planning, Design and Construction](#)
- EH&S approval
[Equipment Purchase](#)
- IT approval
[UF IRM System](#)



EH&S COMMON PURCHASES

3D printers	Dioxins and Tri-, Tetra- and Pentachlorophenol	Gas chromatographs
ADA accommodation items	Drones	Kitchen cooking appliances
Air purifying respirators	Electron Microscopes	Kitchen exhaust systems
Anaerobic chamber	Environmental growth chamber	Lab oven or furnace
Asbestos decontamination or Autoclave and sterilizer	Explosives and fireworks	Lab vectors
Autopsy supplies and equipment	Eyewash stations and safety showers	Lasers
Bacteria	Fall protection devices (harnesses & lanyards)	Liquid scintillation counter
Bench top fume collection cabinets	Firefighting Equipment	Microwave ovens
Biological safety cabinets	Freezers	Ozone generators
Boilers & pressure vessels	Food service equipment	Personal monitoring or detection equipment (confined space meters, gas meters, survey meters and dosimeters, etc.)
Bulk storage tanks	Fume hoods	Portable air cleaning devices
Cleaning of kitchen exhaust systems	Fungi	Radioactive materials
Compressed gas cabinets	Hazardous waste disposal	Refrigerators
Disaster recovery services	Ice Machines	Repair of equipment that is required to be sent off campus (certification of cleaning and decontaminating will be required)
Space Heaters	Isolation glove chamber	Safety Supplies, equipment, and service
Self-contained breathing apparatus	Toxins	Tank and Cylinder and accessories
	Viruses	Walk in refrigerator or cold-room.
		X-ray machines



Workflow

SUBMISSION WORKFLOW

- Verify if item is allowable per UF guidelines:
[Allowable, Conditional, and Non-Allowable Purchases | UF Procurement](#)
- Obtain approval from financial approver
- Check if purchase can be made in the Marketplace
- Verify if Risk Assessment is needed
- Submit request through PCard & Travel Contact Form
- PCard team will:
 - Review
 - Follow-up (if necessary)
 - Email confirmation that charge can be made (if approved)

Helpful Tips

- Explain in laymen's terms (the easier to understand, the better)
- Avoid acronyms (write out terms/organizations)
- Lodging: verify if charge will occur upon Check-in or Check-out



EMAIL NOTIFICATIONS

- PCard team will request additional information if needed
- PCard team will notify cardholder when the card is ready for use
- PCard team's email approval should be attached to the Expense Report as justification
- Charges should be approved within 15 days of posting in UF GO
 - Travel Reports should be reconciled within 15 days of the Travel End Date



Demo

PCard and Travel Support Contact Form

PCard and Travel Support Contact Form

PCard and Travel Support

Name * UF Email *

[Redacted] [Redacted]

- Name and email will auto fill
- Can submit for someone else

In what capacity are you contacting us today? *

PCard Holder

Please select...

PCard Holder

Approver

Delegate/Admin

Traveler/Employee Reimbursement

UF GO Ambassador

Need assistance with *

PCard Temporary Limit Increase/Exception

Please select...

Booking Tool

Delegate & Approver Updates

Employee Reimbursement

General Inquiry

PCard Application Form

PCard Cancellation

PCard Declined Charge

PCard Dispute

PCard Expense Report

PCard Fraud

PCard Personal Expense

PCard Purchase Allowability

PCard Temporary Limit Increase/Exception

Travel Cash Advance

Travel Expense Report

Travel Request

UF GO System



FILL IN APPLICABLE INFORMATION

In what capacity are you contacting us today? *

PCard Holder ▼

Need assistance with *

PCard Temporary Limit Increase/Exception ▼

Temp Increase/Exception

Cardholder Name * Cardholder UFID *

Business Unit * Vendor Name *

Amount *

What is being purchased? *

What is the business purpose? *

Anticipated Charge Date * Fund Code *

Has your manager approved this expense? *

Please select... ▼

Justification why a Purchase Order can't be done *

PCard Approver's Name *

Is there an agreement/contract associated with this purchase? *

Please select... ▼

Requisition/PO Number

If applicable

Traveler's Name

If applicable

Agreement/Contract

If applicable

I have an attachment to upload

Submit

WHY USE THE CONTACT FORM



- More efficient processing time
- Required fields cannot be omitted
- Less follow up necessary

TURNAROUND TIME

- Submit requests *24 to 48* hours prior to desired transaction date
 - Allows time for all necessary information to be reviewed
 - Limits the amount of time the card is at a higher risk level
- If **urgent**: submit contact form, then **call** the PCard team
- Requests cannot be processed more than 1 week in advance
- PCard team will send an email when the expense is approved, and the purchase can be made



PERMANENT INCREASES/EXCEPTIONS



- If more than 4 increases are needed in a 6-month period, a permanent limit increase can be requested via the electronic PCard application
 - Very selective
 - Can be reviewed again after 6 months to 1 year if higher limit needed or not being utilized
- Must be accompanied by justification
 - Preferred in letter form with signature from Dean, Director or Dept Head
- Some categories can be included on initial PCard application

Bonus:

**How to book travel for
someone else**

***to ensure compliance with PCard policy**

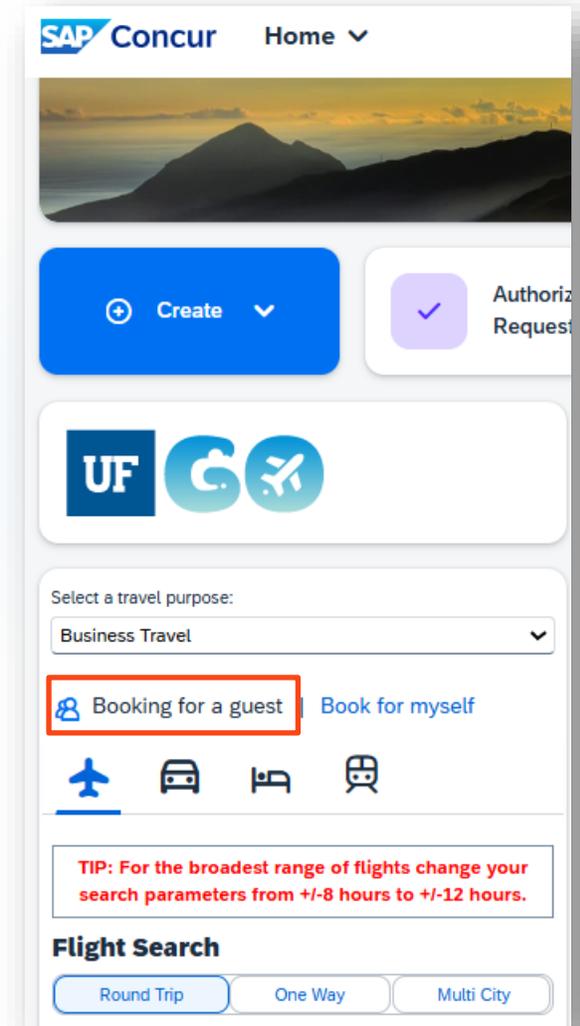
BOOKING FOR SOMEONE ELSE

Options for booking for someone besides yourself:

Including **Guest travelers** and other **UF employees**

1. Call **World Travel Service**, work with the agent to make reservations for the guest or employee.
2. Log into UF GO, using your account, click on **Book for a Guest** (a Guest in this context means someone besides yourself)
3. Log into UF GO, **act as a Delegate** for a UF GO employee (someone who has an active UF GO profile)

***Reminder: never add your PCard to someone else's profile or give someone else your card number!**



BOOKING FOR SOMEONE ELSE

Calling or emailing World Travel Service is always an option for booking travel. Agents will work with you to make reservations for the guest or employee.

For **reservations or ticket changes**, please call (865) 288-1901 or email ufl.travel@worldtrav.com during our normal business hours: (Monday – Friday, 8:00am to 6:00pm ET)

After hours emergency assistance is available 24 Hours a day for your convenience at the numbers below. Refer to code: **S-5CWK** when calling (865) 288-1901 (collect calls accepted).

Booking Airfare for a group of 10+ travelers? WTS can help! Contact groupair@worldtrav.com or by phone: 865-777-1465 for assistance.



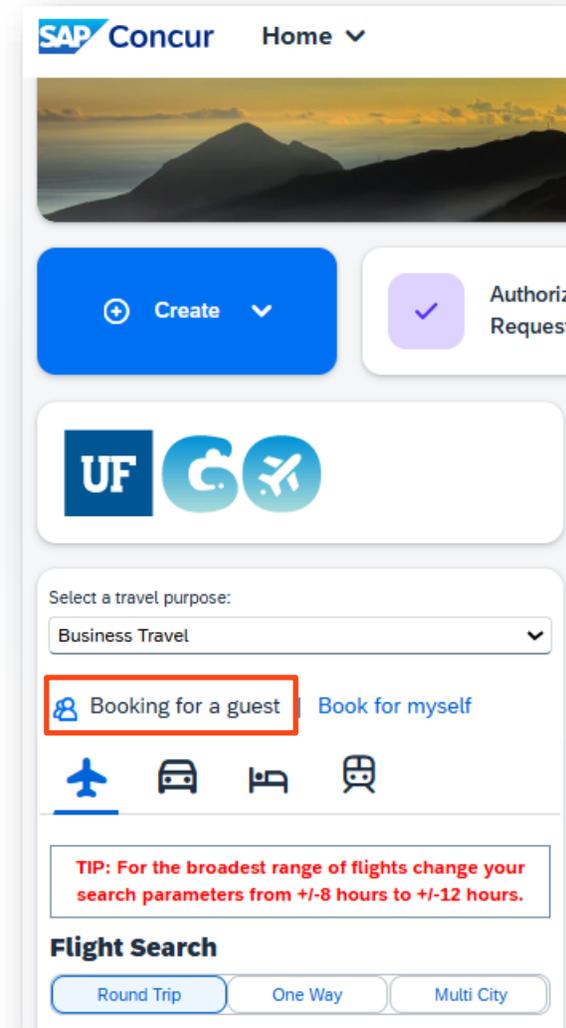
BOOKING FOR SOMEONE ELSE

Log into UF GO, **using your account**, click on **Book for a Guest**

A guest in this situation is any person other than yourself. This can include a UF GO Guest or an employee in your department who doesn't have a PCard of their own.

The Air Card is recommended for airfare, but the PCard holder can Book for Guest and use their PCard, without violating any PCard policies.

*Note: When booking lodging, make sure to call the hotel and provide authorization to charge your PCard, so the Guest or employee doesn't have to pay for the reservation with their own card.

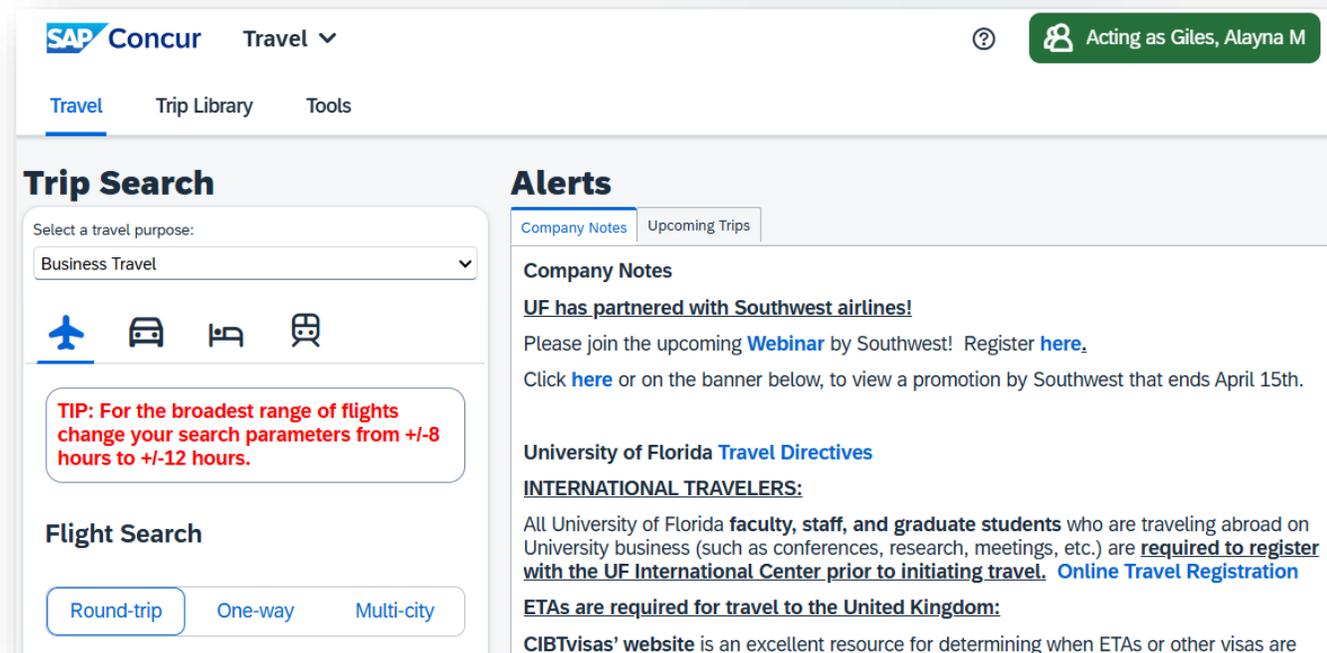
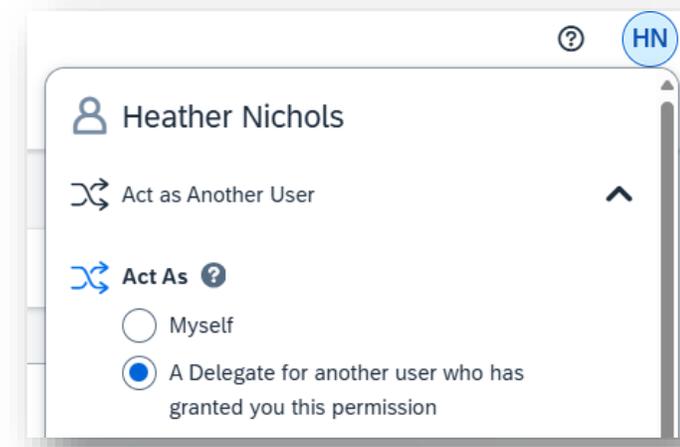


BOOKING FOR SOMEONE ELSE

Log into UF GO, **act as a Delegate** for another UF GO User.

As a delegate, you can book for the traveler and use the payment methods the UF GO user has added to their profile.

Delegates are not able to view or edit the user's credit card information, but they are able to select any of the payment methods the user has saved to their profile (PCard, personal credit cards, or the Air Card) and add it to the reservation.



CONTACT US!

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

UF PCard Team: 352-392-1331

UF Travel Department: 352-294-1114

We are happy to help!



Questions?