

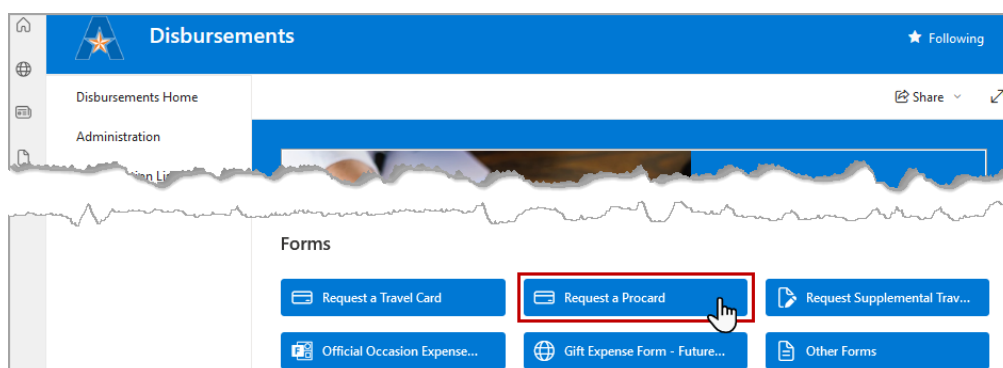
Request a ProCard

The purpose of this job aid is to explain how to submit a ProCard Application. For any questions on this form, please email paymentcard@uta.edu.

Before applying for a ProCard, users must complete the [ProCard Orientation Canvas](#). The completion certificate must be attached to the application to be processed.

Steps to Submit a ProCard Application:

1. Navigate to the [Disbursements SharePoint](#). Login using employee email and password.
2. Click the link **Request a ProCard** to begin the form.



The **ProCard Application** will display.

3. In **Section1 – Cardholder Information** input the following:
 - a. Select the **Application Type**. This radio button defaults to **New Card**.

Application Type

☒ New Card

☐ Transferring Departments

Note: If the cardholder already has a card and is changing departments, change this to *Transferring Departments*.

- b. Complete the Cardholder information. All fields must be entered: Cardholder Name, Email Address, Employee ID #, Job Title, Department, Work Phone #, Cell Phone #, and Birthday of the Cardholder.

| | |
|--------------------------------|-----------------------------|
| Cardholder Name | Sam Maverick |
| Email Address | sam.maverick@uta.edu |
| Employee ID # | 1000123456 |
| Job Title | Business Support Analyst II |
| Department | OIT Knowledge Services |
| Work Phone # | 817-272-2155 |
| Cell # | 817-123-4567 |
| Birth Month/Day (MM/DD) | 01/11 |

- c. Complete the **Default Chartfield Information**. This information will automatically be applied to the ProCard as the default Cost Center or Project to be charged for transactions.

Note: This information can be found through the Commitment Control module in UTShare, or from the SpeedTypes screen. Instructions to find the chartfield information can be found on page 3 of the [Managing Department Funds Training Guide](#).

| Default Chartfield Information | |
|---|--------|
| If you do not have this information, consult your department Administrative Assistant | |
| Fund: | 3105 |
| 6-digit Department ID Number: | 320105 |
| Cost Center / Project ID Number: | 310350 |
| Function: | 200 |

If necessary, the spending limit can be modified to \$20k or \$30k.

| | |
|----------------|---|
| Spending Limit | <input checked="" type="radio"/> \$10,000 (default) <input type="radio"/> \$20,000 <input type="radio"/> \$30,000 |
|----------------|---|

4. In **Section 2 – Role Assignments**, enter the necessary ProCard Reconciler and Reviewer (Approver) information as needed. Complete the Name, Employee ID #, and Email Address fields. If you need multiple reconcilers or reviewers, click Insert Item to add additional rows.

| Section 2 - Role Assignments | | |
|------------------------------|---------------|-----------------------|
| Reconciler(s) | | |
| Name | Employee ID # | Email Address |
| Trinity Hall | 6000123456 | trinity.hall@uta.edu |
| Jane Dolan | 1000654321 | jane.dolan@uta.edu |
| Insert item | | |
| Reviewer(s) | | |
| Name | Employee ID # | Email Address |
| Ned Nedderman | 6000654321 | ned.nedderman@uta.edu |
| Insert item | | |

Note: This must include own information if user will be reconciling or reviewing their own transactions.

- ProCard Reconcilers must have level II or III UTShare Security access. A UTShare Security Access Request can be submitted [here](#).
- Knowledge Services offers the ProCard Reconciliation Training twice a month. It is highly suggested new reconcilers attend this training. Registration is available at <https://webapp.uta.edu/oci-training/>

- c. The ProCard Reviewers (Approvers) role is only assigned to department heads and Principal Investigators on projects. In general, the ProCard Reviewer (Approver) should be the Department Chair, Director, Dean, etc.
5. In **Section 3 – Attachments**, attach the ProCard Orientation completion certificate.
 - a. Select **Click here to attach file**.

- b. Click **Browse**.
 - c. Locate Certificate and click **Open**.
 - d. Click **Attach**.

Note: Users must complete the [ProCard Orientation Canvas](#) course to be issued a Procard.
6. Click **Check for Errors** at the bottom of the form. If any fields are missing required information, they will be highlighted yellow. If all necessary fields are completed, a green check will be displayed to the left.
7. Click **Sign & Submit** to submit the document for approvals and processing.

Notes:

- If the cardholder submits the Application, the workflow routes to dept head/supervisor for approval.
- If someone else submits the Application on behalf of cardholder, it will go to cardholder first for approval and then to supervisor.
- The first listed Reconciler will receive an email requesting an agreement to be the reconciler.
- The first listed Reviewer will receive an email requesting an agreement to be the reviewer.
- All emails for approvals will come from UTA O365.
- Agreement for signature will come from svccollabdevuta.edu

Important: If all recipients do not accept the request for agreement within 5 days, the application will be terminated and need to be resubmitted.

After all approvals are completed, the form returns to the Office of Disbursements for card ordering and processing.