

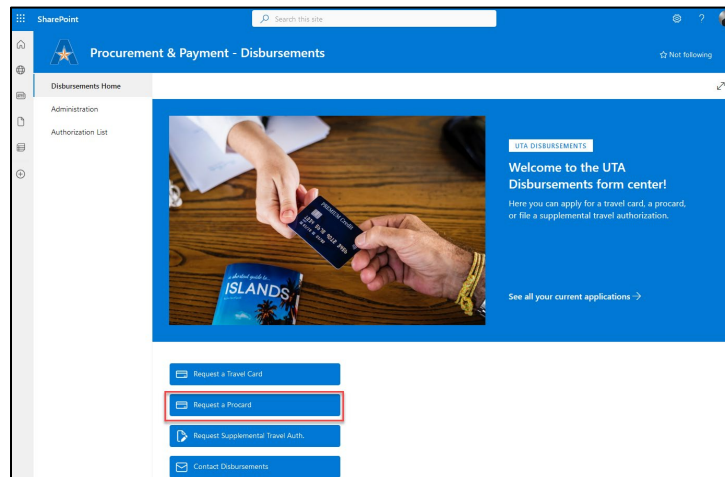
Request a ProCard Job Aid

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

Note: This process will be used in lieu of submitting the previous paper ProCard application.

Steps to Submit a ProCard Application:


1. Navigate to the Disbursements SharePoint site at <https://mavsuta.sharepoint.com/sites/forms/baet/travel> and login using your employee email and NetID password. This can also be accessed from the Travel website: <https://www.uta.edu/business-affairs/travel/index.php>
2. Click the link "Request a ProCard" to begin the form.



3. Select the Application Type. This radio button defaults to New Card. If the cardholder already has a card and is changing departments, change this to Transferring Departments.
4. Enter the cardholder email address in the top field. Click the Check Names icon to the right or wait a few seconds.

Section 1 - Cardholder Information

Enter your email below, then click the "Check Names" button to resolve the address.



Prepared By: Ruby, Augustus C

Application Type

New Card

Transferring Departments

5. Click the "Auto-fill my info!" button that appears just below. This will attempt to populate all available Cardholder information.

Enter your email below, then click the "Check Names" button to resolve the address.

Email address resolved!

Auto-fill my info!

6. Correct, update, and complete the Cardholder Information:
 - a. The form will auto-populate the Cardholder Name, Email Address, Employee ID, Job Title, Department, and Work Phone of the employee. Manually add the Cell Phone number and Birthday of the Cardholder. Update any other information as necessary.

Cardholder Name	Ruby, Augustus C
Email Address	<input type="text" value="gusruby@uta.edu"/>
Employee ID #	<input type="text" value="6001234567"/>
Job Title	<input type="text" value="Business Support Analyst II"/>
Department	<input type="text" value="OIT Continuous Improvement"/>
Work Phone #	<input type="text" value="+1 817 272 2155"/>
Cell #	<input type="text" value="817-555-5555"/>
Birth Month/Day (MM/DD)	<input type="text" value="01/01"/>

7. 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. 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:	<input type="text" value="3105"/>
6-digit Department ID Number:	<input type="text" value="320105"/>
Cost Center / Project ID Number:	<input type="text" value="310350"/>
Function:	<input type="text" value="200"/>

8. 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

9. In “Section 2 – Role Assignments”, manually enter the necessary ProCard Reconciler and Reviewer information as needed. You must include your own information if you will be reconciling or reviewing your own transactions.

- a. ProCard Reconcilers have access to complete the UTShare ProCard reconciliation module once the monthly statements are closed. If you will have this role for yourself, ensure that you have completed the Knowledge Services ProCard Reconciliation Training. This class is offered twice a month. Registration is available at <https://webapp.uta.edu/oci-training/>
- b. ProCard Reviewers have access to review and approve on the UTShare ProCard Reconciliation module. This role is only assigned to department heads and Principal Investigators on projects. In general, you will want your ProCard Reviewer to be your Department Chair, Director, Dean, etc.
- c. Complete the freeform 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
Sara Barton	6001123456	sara.barton@uta.edu
Robin Baker	1000012345	robinlb@uta.edu
<input type="button" value="Insert item"/>		

Reviewer(s)

Name	Employee ID #	Email Address
Lee Pierce	1000123456	lee.pierce@uta.edu
<input type="button" value="Insert item"/>		

10. 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.

11. Click “Sign & Submit” to submit the document for approvals and processing.

<input checked="" type="checkbox"/>	<input type="button" value="Check for Errors"/>	<input type="button" value="Sign & Submit"/>
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Notes:

- If the cardholder submits the workflow routes to dept head/supervisor for approval.
- If someone else submits 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

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

1. Once the card arrives from CitiBank, the card agreement will be sent out by Disbursements via Adobe Sign. This will arrive as an email notification and link to interact with, delivered to the cardholder.
2. After the cardholder submits the signed card agreement and attends the ProCard orientation, a request to schedule the ProCard pickup will be sent. ProCards cannot be picked up unless the cardholder has attended the ProCard Orientation.

Training:

The Office of Disbursements hosts ProCard Orientation which is required for cardholders on how to use the ProCard and cover policy and procedures.

Knowledge Services hosts ProCard Reconciliation training which is encouraged for ProCard reconcilers and reviewers regarding the monthly statement processing in UTShare.