

ProCard Application Process - Overview

What do I need to do before applying for a ProCard?

- Must be an employee of University of Louisville, University of Louisville Athletic Association, or the University of Louisville Research Foundation. Temporary employees are not eligible to receive a ProCard.
- Identify who will be the cardholder, reconciler/reallocator, approver, and Director/Department Chair or Dean/Vice President associated with the account. The cardholder can be the reconciler/reallocator of the account, but not the approver.
- Make sure all roles have completed the required testing and training as applicable:
 - Cardholder – Blackboard Test score of 100%.
 - Reconciler/Reallocator – Blackboard Test score of 100% and PeopleSoft training.
 - Approver – Blackboard Test score of 100% and PeopleSoft training.*

How do I apply for a ProCard?

- Complete the application process in PeopleSoft.
 - **If you do not have access to PeopleSoft Financials, please contact the UBM of your department who can assist.**
- Print the application through University Reports (The hard copy application may be printed real-time after the electronic application is completed in PeopleSoft).
- Review printed application for accuracy, obtain required signatures, add address, and send application to the ProCard Office.

When can I pick-up my card?

- The new ProCard will arrive within 3-5 business days after the completed application is received and processed.
- The ProCard Office will notify the cardholder when the ProCard is available to be picked up.
- The following information is required when picking up ProCard:
 - Picture ID
 - Certificate of Destruction - for old card, if a replacement is being issued
 - Proxy Statement – if another employee is picking up the card on behalf of the cardholder
- The cardholder must sign the back of the ProCard immediately upon receipt and call the telephone number indicated on back of the card to activate the card.

*Approvers should only complete this training if they would like to review/approve transactions in PeopleSoft. This is a voluntary process for approvers; the approver's primary role is to review and sign-off on the monthly hard copy documentation - Transaction Summary Log, receipts, bank statement. Approvers who do not want to use PeopleSoft must submit the Non-PeopleSoft Request Form.

Helpful links:

[PeopleSoft Training](#)

[Non-PeopleSoft Approver Request Form](#)

[Cardholder Responsibilities](#)

[Reconciler Responsibilities](#)

[Approver Responsibilities](#)

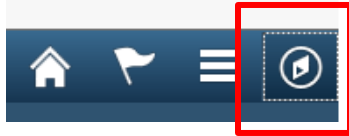
[Certificate of Destruction Form](#)

[Proxy Statement Form](#)

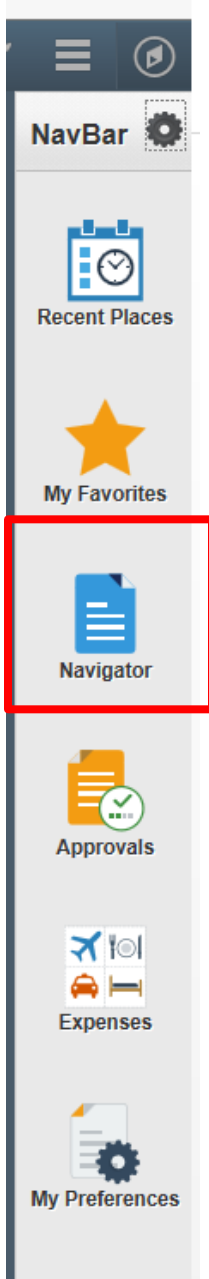
Instructions for completing on-line application in PeopleSoft Financials

Sign into [PeopleSoft Financials](#) and follow steps below:

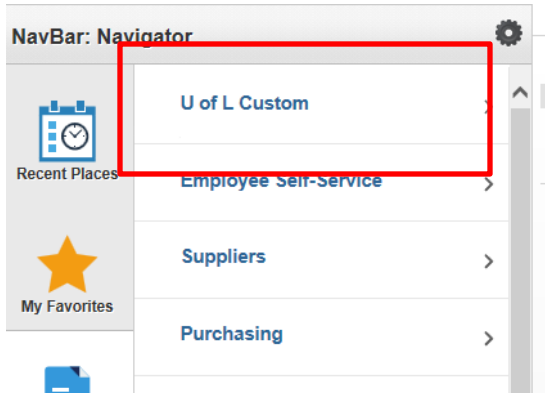
Click the compass icon in the top right corner of the screen to access the Navigation Bar, or “NavBar”



Click the “Navigator” icon to open the full Navigation menu.



Click “UofL Custom”



Click “UL Procurement Card”



Click “Procurement Card Application”



Note: If you do not see this screen, make sure you are in PS Financials and not PS HR/CS

PCard applications


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Empl ID

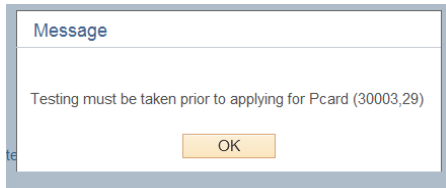
Request Number

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Click [Add a New Value](#) [Find an Existing Value](#) [Add a New Value](#)

The pop-up window will appear:



Click [OK](#) if test completed.

If testing has not been completed, log out of the system and complete the testing. To register for the test, click this link: <http://louisville.edu/procard/forms/blackboard-test-registration> Verify with the ProCard Office that your scores have been recorded. Once testing is completed with a score of 100%, you may proceed to the next step to complete the application.

Enter the Employee ID Number of the cardholder/responsible party. Leave the Request Number blank. This will fill in automatically, once the application has been saved.

PCard applications

Empl ID:

Request Number:

Find an Existing Value | Add a New Value

Click and enter the required information as illustrated below:

The screenshot shows the 'Request Procurement Card' form with several callout boxes providing instructions:

- Enter your default account code**: Points to the 'Account' field.
- Enter Telephone Number – format as: 5028526250 (no dashes or parentheses)**: Points to the 'Telephone' field.
- 3) Select Card Type – Declining balance: Only check this box if you wish to enter a maximum amount for the card’s life cycle.**: Points to the 'Decline Balance Card' radio button.
- 1) Select Card Type – Department Account: Check this box if the card is being issued as a Departmental Card with the Department name appearing on the card. Make sure to enter Department Name for card.**: Points to the 'Department Account' radio button.
- 2) Select Card Type – Individual Account: Check this box if the card is being issued as Individual card with your name appearing on the card.**: Points to the 'Individual Account' radio button.
- Enter Department SpeedType**: Points to the 'SpeedType Key' field.

The form includes sections for 'Amount Limits' (Per Trans: 2500.000, Monthly: 10000.000), 'Card Type' (Department Account, Individual Account, Decline Balance Card), 'Chartfields' (Fund, Dept, Program, Project, Grant Exp Dt), and 'Existing Cards' (table with First/Last buttons). Buttons for 'Save' and 'Notify' are at the bottom.

Click

Note: # 3 to be used only if maximum amount is to be used. When maximum amount is used, then this card is no longer valid/useable.

When information has been entered in all fields and saved, your screen will appear as follows:

Request Procurement Card

Employee ID: [REDACTED] Name: [REDACTED] Request No.: 3

*Account: 541100 Laboratory

U of L Pcard website

Amount Limits
Per Trans: 2500.000
Monthly: 10000.000
Telephone: [REDACTED]

Card Type
 Department Account
Dept Name for Card:
 Individual Account
 Decline Balance Card
Max Amt:

Existing Cards
First Last

Chartfields
SpeedType Key: 01044
Fund Dept Program Project Grant Exp Dt
1000 2314000156 01044
Dept Name: Purchasing

Save Notify

From Navigate, click on Procurement Card Approval:

Navigate > UofL Custom > UL Procurement Card > Procurement Card Approval

Request Procurement Card

Employee ID: [REDACTED] Name: [REDACTED] Request No.: 3

*Account: 541100 Laboratory

U of L Pcard website

Amount Limits
Per Trans: 2500.000
Monthly: 10000.000
Telephone: [REDACTED]

Card Type
 Department Account
Dept Name for Card:
 Individual Account
 Decline Balance Card
Max Amt:

Existing Cards
First Last

Chartfields
SpeedType Key: 01044
Fund Dept Program Project Grant Exp Dt
1000 2314000156 01044
Dept Name: Purchasing

Save Notify Add

[Credit Card Appl Approval](#) | [Credit Card Appl App Sign](#)

Click [| Credit Card Appl App Sign](#)

Note: If application does not pull up, use Employee Id and Request #.

Request Procurement Card

Employee ID: [Redacted] Name: [Redacted] Request No.: 3

Account: 541100 Laboratory [U of L Pcard website](#)

Send to Vendor
 Send to Supplier

Approved By

Director/Dept Chair:	[Redacted]	[Redacted]	12/01/2009
Dean/Vice President:	[Redacted]	[Redacted]	12/01/2009
Purchasing:	[Redacted]	[Redacted]	

Card Approvers

[Redacted]	[Redacted]	12/01/2009	[+]
<input checked="" type="checkbox"/> Testing	01/01/1900	<input checked="" type="checkbox"/> Training	02/25/2006
<input type="checkbox"/> Training/NR			


Reallocators

[Redacted]	[Redacted]	12/01/2009	[+]
<input checked="" type="checkbox"/> Testing	01/01/1900	<input checked="" type="checkbox"/> Training	02/27/2006

[Credit Card Appl Approval](#) | [Credit Card Appl App Sign](#)

Annotations:

- Enter Director/Dept Chair's Employee ID
- Enter Dean/Vice President Employee ID - Not req'd for School of Medicine
- Enter Cardholder's Approver(s) Employee ID
- Enter Cardholder's Reallocator(s) Employee ID
- The ProCard Office will enter Purchasing and Send to Supplier information.
- Enter the date you are entering the Application in all applicable date fields.

If the approver is also the Reallocator, add this information in both fields. If you have more than one Approver or Reallocator, you must click on the plus sign () in the appropriate field to add a row and additional information.

Click 

Note: The **Request No.:** will be needed later to print the application.

Request Procurement Card

Employee ID: [Redacted] Name: [Redacted] Request No.: 3

Account: 541100 Laboratory [U of L Pcard website](#)

Send to Vendor
 Send to Supplier

Approved By

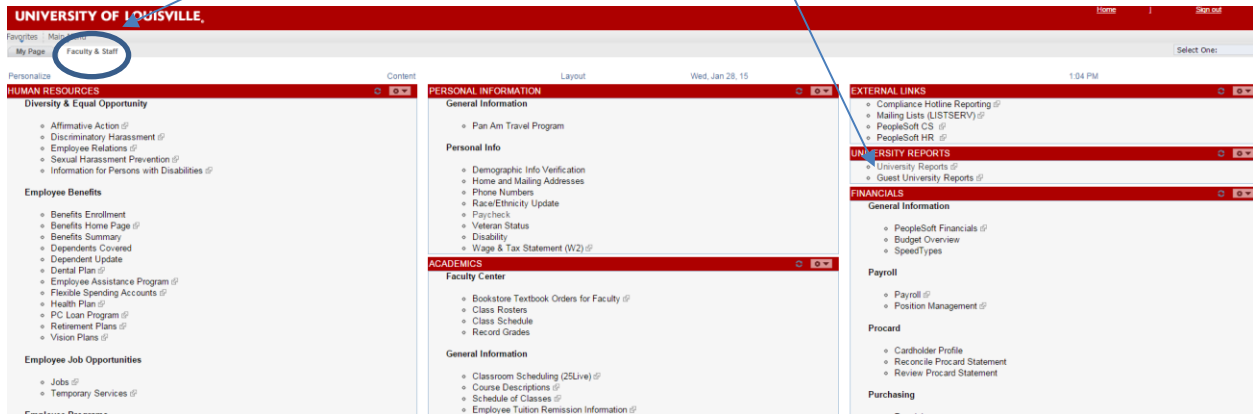
If all information is correct, you can print the application from University Reports immediately.

Note: If corrections need to be made to the saved application, go page 11 for instructions.

Instructions for printing on-line application in University Reports

Applications may be printed immediately after completing the application process in PeopleSoft.

Sign into ULINK, click on the Faculty & Staff tab, select University Reports and follow the steps below:



The following screen will appear to sign into the University Reports option:

The screenshot shows the login screen for the University of Louisville University Reports. The page features the University of Louisville logo and the text 'Log On to University Reports'. Below the logo, there is a 'Help' link. The main content area contains the following text: 'Enter your user information and click Log On. (If you are unsure of your account information, contact your system administrator.)'. There are three input fields: 'User Name:', 'Password:', and 'Authentication:'. The 'Authentication:' field is a dropdown menu with 'LDAP' selected. A 'Log On' button is located at the bottom right of the form.

The next screen will appear:

Home Documents

View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details

My Documents

Folders

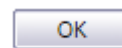
- Public Folders
 - Financials
 - Financials - Asset Management
 - Financials - Billing
 - Financials - Department - Analysis
 - Financials - Department - Detail
 - Financials - Department - Effort Reports
 - Financials - Department - Encumbrances
 - Financials - Department - Planning
 - Financials - Department - Procurement Card
 - Financials - Individual Analysis
 - Financials - Individual Detail
 - Financials - Individual Reconciliation
 - Financials - Links
 - Financials - Listings
 - Financials - PI
 - Financials - Purchasing
 - General University Reports

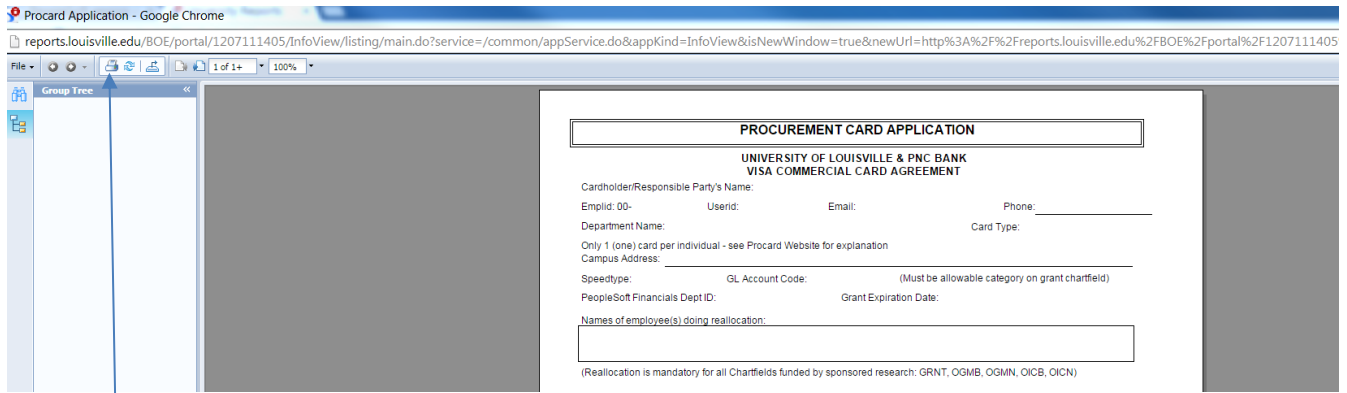
Title ▲
Financials
General University Reports

Click  Financials - Listings then click  Procard Application from the list below:



Enter cardholder's Employee ID and the request # from the application, click





Click the  icon to print your application.

The printed application should be reviewed for accuracy prior to obtaining required signatures.

- Review the information for accuracy that is populated from application in PeopleSoft.
- Print legibly the campus address on the printed application.
- If grant related, make sure the expiration date is populated on the application, otherwise the application cannot be processed. Note: The expiration date cannot be written or manually entered on the application.
- Obtain all required signatures – Cardholder, Reconciler/Reallocator, Approver, and the responsible party for the Chartfield – Director/Department Chair or Dean/Vice President.
- Review again to be sure all information is correct and forward completed application to the ProCard Office: Houchens Building – LL05.

Instructions for making corrections to saved on-line application in PeopleSoft Financials

Navigate> UofL Custom > UL Procurement Card > Procurement Card Approval

PCard Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Empl ID begins with ▼ 

Request Number begins with ▼

Search

Clear

Basic Search



Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

Enter your Employee ID and Request # and click [Find an Existing Value](#) |

If you do not recall your request # go to page 13 for instructions.

PCard Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Empl ID

Request Number

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter your Employee ID and Request # and click [Find an Existing Value](#) |

Request Procurement Card

Employee ID: 3000400 Name: Powell,Sheryl L Request No.: 3

*Account: Laboratory

[U of L Pcard website](#)

Amount Limits		Card Type	
Per Trans:	<input type="text" value="2500.000"/>	<input checked="" type="radio"/> Department Account	
Monthly:	<input type="text" value="10000.000"/>	Dept Name for Card:	<input type="text" value=""/>
Telephone:	<input type="text" value="502/852-8214"/>	<input type="radio"/> Individual Account	
		<input type="radio"/> Decline Balance Card	
		Max Amt:	<input type="text" value=""/>

Existing Cards				
			First	Last

Chartfields				
SpeedType Key: <input type="text" value=""/>				
Fund	Dept	Program	Project	Grant Exp Dt
1000	2314000156	01044		
Dept Name: Purchasing				

[Save](#) [Notify](#) [Add](#)

[Credit Card Appl Approval](#) | [Credit Card Appl App Sign](#)

Make necessary changes and click [Save](#)

Instructions for finding request # required in PeopleSoft Financials or University Reports

Main Menu > UofL Custom > UL Procurement Card > Procurement Card Approval



PCard Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Empl ID:

Request Number:

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter your Employee ID and click

PCard Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Empl ID:

Request Number:

[Basic Search](#)

Search Results

View All First 1-3 of 3 Last

Empl ID	Name	Request Number	Card Issuer	Plan	Processed	Flag	Send to Supplier
[REDACTED]		1	PNC				N
[REDACTED]		2	PNC				N
[REDACTED]		3	PNC				N

[Find an Existing Value](#) | [Add a New Value](#)

Note the last Request Number and continue with process.