



Travel Talks

Wednesday 03/06/24



Travel Talks

Today's Agenda

Requesting a Travel Card

- Blackboard

- Application

Q&A Session

This presentation will be recorded for future viewing

Travel Talks to continue **WEDNESDAYS @ 1:30**

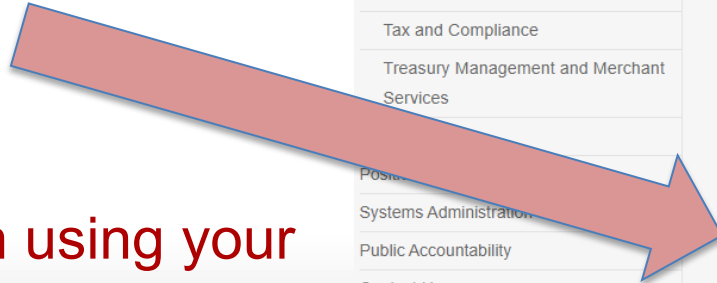
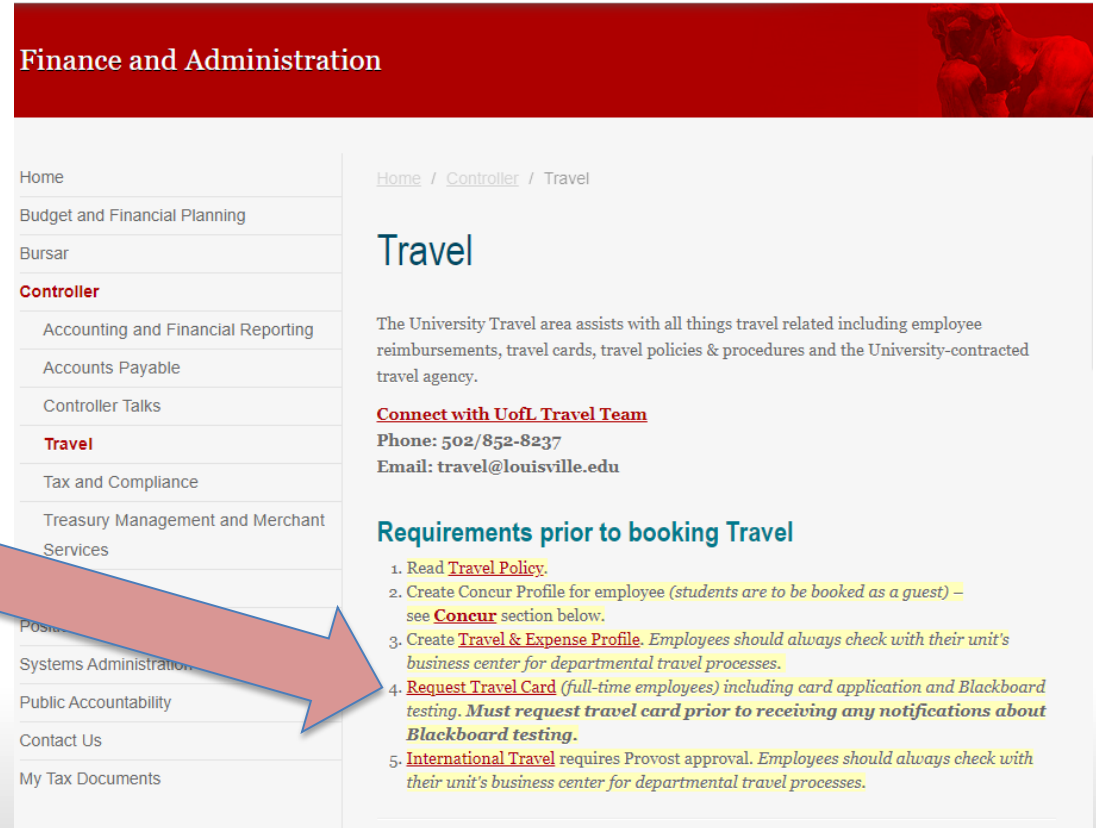
Requesting a Travel Card

From the Top!

Louisville.edu/travel
YOUR ONE-STOP SHOP!

Look for the link to
 “Request Travel Card”

You will need to sign in using your
 UserID and password

The screenshot shows the 'Finance and Administration' website. The main navigation menu on the left includes: Home, Budget and Financial Planning, Bursar, **Controller** (with sub-items: Accounting and Financial Reporting, Accounts Payable, Controller Talks), **Travel**, Tax and Compliance, Treasury Management and Merchant Services, Post..., Systems Administration, Public Accountability, Contact Us, and My Tax Documents. The 'Travel' page content includes: 'Home / Controller / Travel', 'Travel' heading, a description of the travel area, contact information for the UofL Travel Team (Phone: 502/852-8237, Email: travel@louisville.edu), and a section titled 'Requirements prior to booking Travel' with five numbered steps: 1. Read [Travel Policy](#). 2. Create Concur Profile for employee (students are to be booked as a guest) – see [Concur](#) section below. 3. Create [Travel & Expense Profile](#). Employees should always check with their unit's business center for departmental travel processes. 4. [Request Travel Card](#) (full-time employees) including card application and Blackboard testing. **Must request travel card prior to receiving any notifications about Blackboard testing.** 5. [International Travel](#) requires Provost approval. Employees should always check with their unit's business center for departmental travel processes.

Request Travel Card

Travel Card Request

by Controller — last modified Feb 16, 2024 03:48 PM

Before submitting the request for a travel card, please make sure that an **APPROVED Expense Profile** is completed for the *Traveler*, *Proxy* and *Approver*. The information in the expense profile is **REQUIRED** for the travel card application.

Upon submission, our office will review the submitted form and setup employee with blackboard testing and begin travel card application.

[Expenses Profile Request Instructions](#)

If requesting more than one individual travel card, you may use this form if you do not wish to submit individually: [Travel Card Request - Multiple Cards](#).



***Note: if requesting multiple cards,
THERE'S A LINK FOR THAT!**

Email Address (Employee Submitting Request):

Travel Cardholder FIRST Name:

Travel Cardholder LAST Name:

Travel Cardholder Employee ID Number: 7-digit number

Travel Cardholder Employee UserID:

Travel Cardholder Email Address (@louisville.edu):

Campus Location:

- Belknap
- Health Sciences Center
- Shelby



Multiple Cards?

Travel Card Multi-Request Form						
Can be used for multiple travel cards being requested						
Please double check your information inserted below:						
Travel Cardholder's Information						
Date requested	First Name	Last Name	Email Address (@louisville.edu)	Employee ID	Employee User ID	Campus Location (please select)

[Home](#) / [Controller](#) / [Travel](#) / Travel Card Request - Multiple Cards

Travel Card Request - Multiple Cards

by [Robertson, Sarah](#) — last modified Feb 29, 2024 11:59 AM

This form can be used for requesting more than one individual Travel Card. Please use this excel [Travel Card Multi-Request form](#) (save data) and attach prior to clicking "Submit" at the bottom of this web form.

Before submitting the request for a travel card, please make sure that an **APPROVED Expense Profile** is completed for the *Traveler, Proxy* and *Approver*. The information in the expense profile is **REQUIRED** for the travel card application.

Upon submission, our office will review the submitted form and setup employees with blackboard testing and begin travel card application.

[Expenses Profile Request Instructions](#)

Email Address (Employee Submitting Request):

joseph.connelly.1@louisville.edu

Multiple Travel Cards requested: attach Multi-Request form from above and upload to this submission request.

Choose File No file chosen

Submit Reset



The Office of Finance and Administration serves all eligible faculty, staff, and students regardless of race, color, national origin, sex, disability, or age.

Your Patience is Needed

- The Travel Office Mailbox will receive an email with this information
- What will happen next?
 - The cardholder will receive an email with an Application
 - The cardholder will be set up to take the *Travel Card Policy/Procedures Test* in Blackboard
(Please wait to receive this email before asking for access)

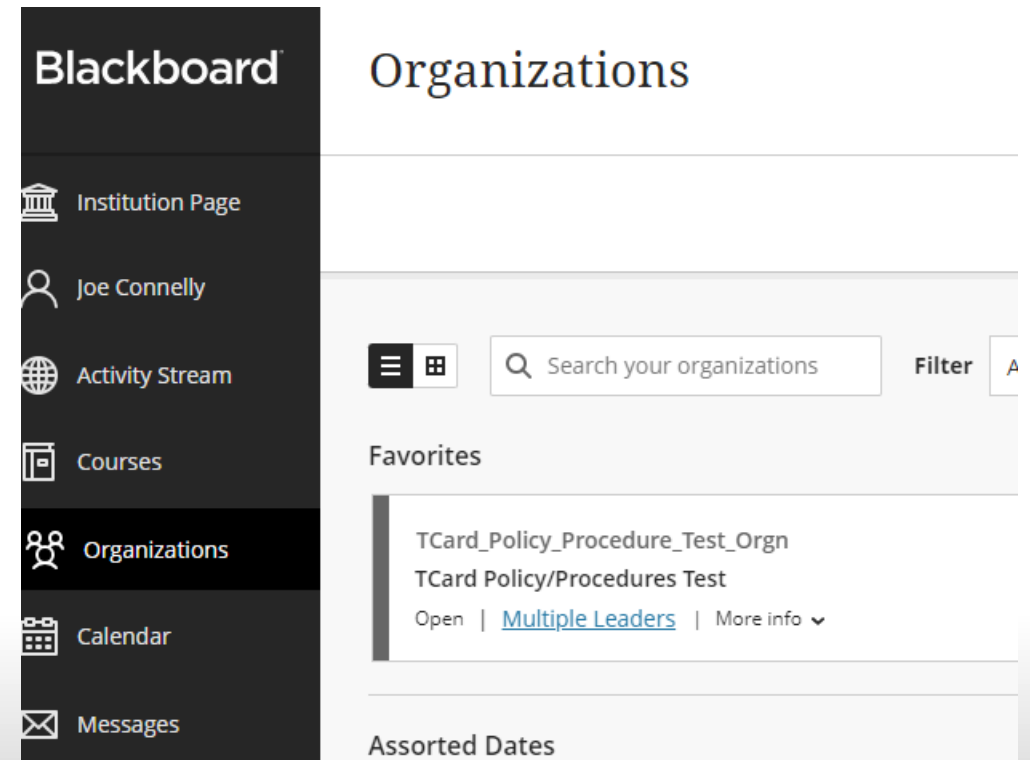
Sidenote: wait times have lengthened due to staffing

Tests? I hate those!

<https://blackboard.louisville.edu/>



- Choose the “Organizations” Tab
- Choose Travel Card



Tests? I hate those!



TCard Policy/Procedures Test

Travel Card Test Updated Sept 20, 2022

Begin: TCard Policy/Procedures Test

INSTRUCTIONS

Force Completion This test can be saved and resumed later.
 Multiple Attempts This test allows multiple attempts.

Click **Begin** to start: TCard Policy/Procedures Test. Click **Cancel** to go back.
 You'll be previewing this assessment and your results won't be recorded.

Select 'Begin' to start. Select 'Cancel' to quit.

Cancel Begin



YOU DID IT!

Test: Cardholder must score 20/20
-Test can be taken multiple times

Application: Cardholder must acquire the proper signatures

Send completed application and acknowledgment of completed test to Travel@louisville.edu

Once the card has been ordered, you will receive a confirmation email.

-Shipping and processing: 7-10 Business days
-Time is variable, currently

TRAVEL CARD APPLICATION

**UNIVERSITY OF LOUISVILLE & PNC BANK
VISA COMMERCIAL CARD AGREEMENT**

Cardholder / Responsible Party's Name: _____

Cardholder Type (select one): Employee Graduate Student

Empl ID: _____ User ID: _____ Email: _____ Phone: _____

Only 1 (one) card per individual - see Travel Card Website for explanation

Campus Address: _____

Speedtype: _____ (Must be allowable category on grant chartfield)

PeopleSoft Financials Dept ID: _____ Grant Expiration Date: _____

The Cardholder, who is an employee of the University of Louisville, the University of Louisville Athletic Association, or the University of Louisville Research Foundation in consideration of the issuance and use of a PNC Bank Visa Card ("Travel Card"), hereby agrees to the following:

1. The card is for business-related travel purchases only; personal charges are not to be made to the card.
2. Cardholder agrees to comply with University policies and procedures regarding Travel, and Sponsor specifications if applicable.
3. Safeguard the Travel Card from unauthorized use and report to PNC Bank (800-685-4039), Travel and Public Safety any lost or stolen card or unauthorized use as soon as it is discovered. Suspected fraud is to be reported to all of the above including Audit Services. (Do NOT report lost/stolen cards to Audit Services.)
4. Travel Card shall be used only for business purposes of the University, within the employment relationship between responsible party and the University and is for the sole business use of the cardholder.
5. Responsible Party agrees that items purchased are for and will be used by the University for exempt purposes.
6. I am creating a financial obligation for my department which cannot be terminated until all payments are made.
7. I agree to maintain all receipts, statements and other information relating from the use of the card in accordance with University policy and submit fully approved expense reports timely (60 days or will be taxed to employee).
8. I will perform, or have performed monthly reconciliations and maintain these reports for audit purposes.
9. Improper or fraudulent use of the Card may result in disciplinary action, up to and including termination of employment.
10. University may terminate my right to use the Card at any time for any reason. I agree to surrender the Card immediately upon request or upon termination of employment.
11. Unauthorized or non-business purchases charged to my Travel Card may be deducted from my University pay.
12. The Travel Card Department will cancel all Travel Cards with no activity for (18) consecutive months.
13. I agree to keep the Travel Card in my possession, secure at all times and to apply the same safeguards that I use in protecting my personal credit card(s).

By my signature, I acknowledge and agree that I am currently and will remain in compliance with University of Louisville Conflict of Interest policies, including any disclosure obligations. Further, I certify that I will remain in compliance with all applicable University of Louisville policies for the duration of my employment with the institution.

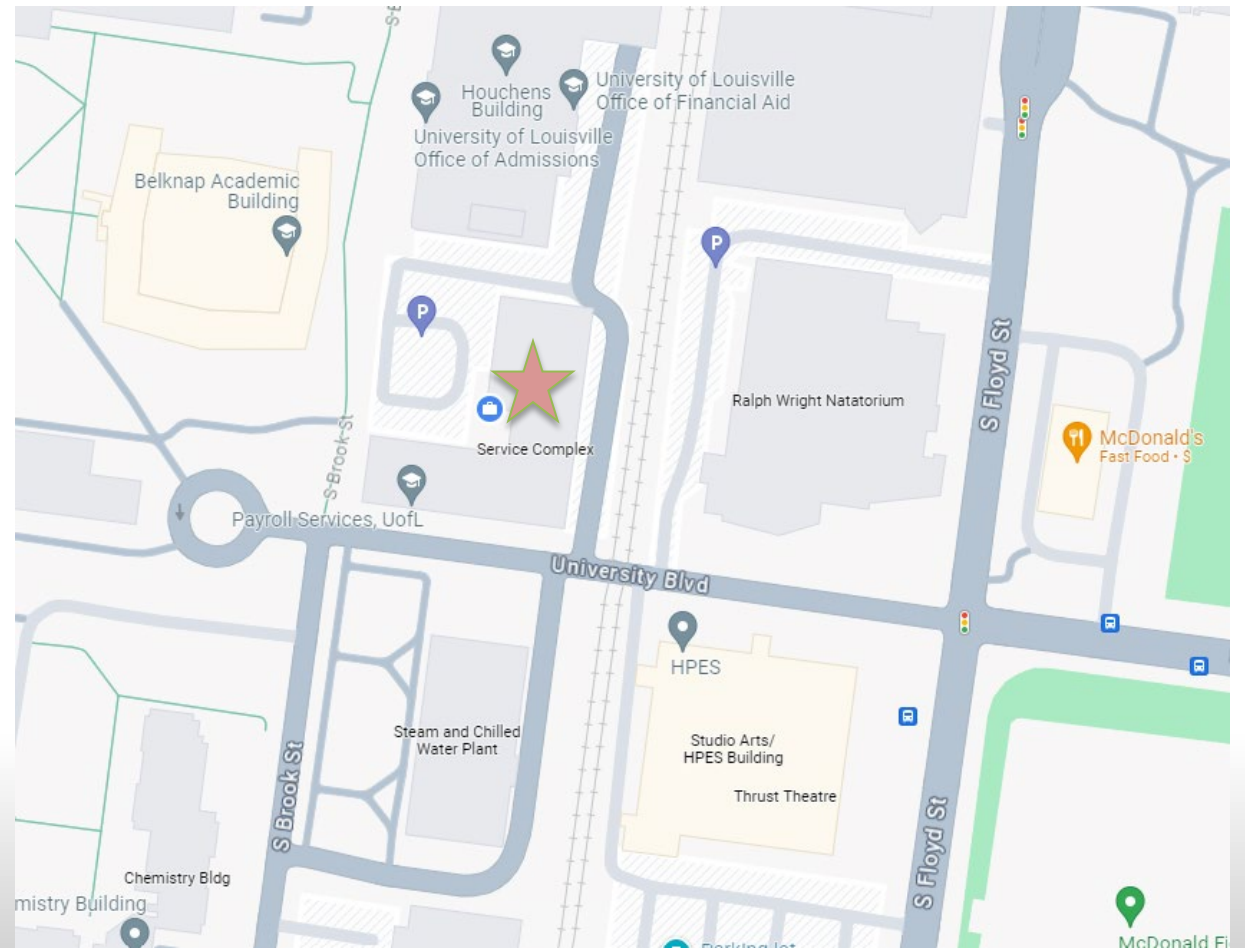
Cardholder
I agree to abide by the terms of usage listed above as well as any other related Travel Card policies.

Cardholder Signature: _____ Date: _____

Now What!?

You will get a confirmation from the Travel Office that the card has come in, been processed, and ready to be picked up!

Come visit us at [2215 S Brook St!](#)



Travel Card Quick Facts & Reminders:

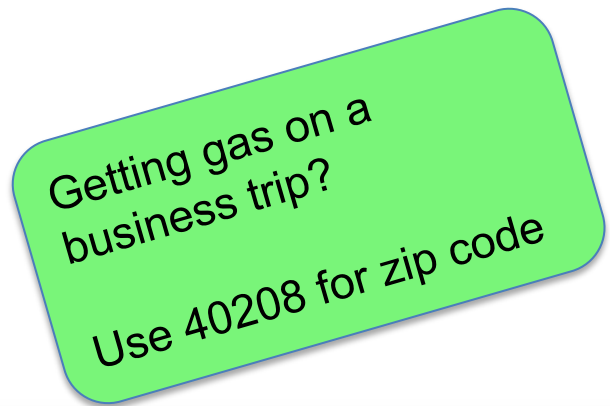
Activating a Travel Card:

- Call 1-800 number on the back of the card
- The card pin is the last 4 digits of the Carholders' EmployeeID

Sign the Travel Card!

Travel Card Billing Address:

2215 S Brook St
Louisville, KY 40208



Personal Purchases, including personal meals, are strictly forbidden!

QUESTIONS

COMMENTS

CONCERNS

