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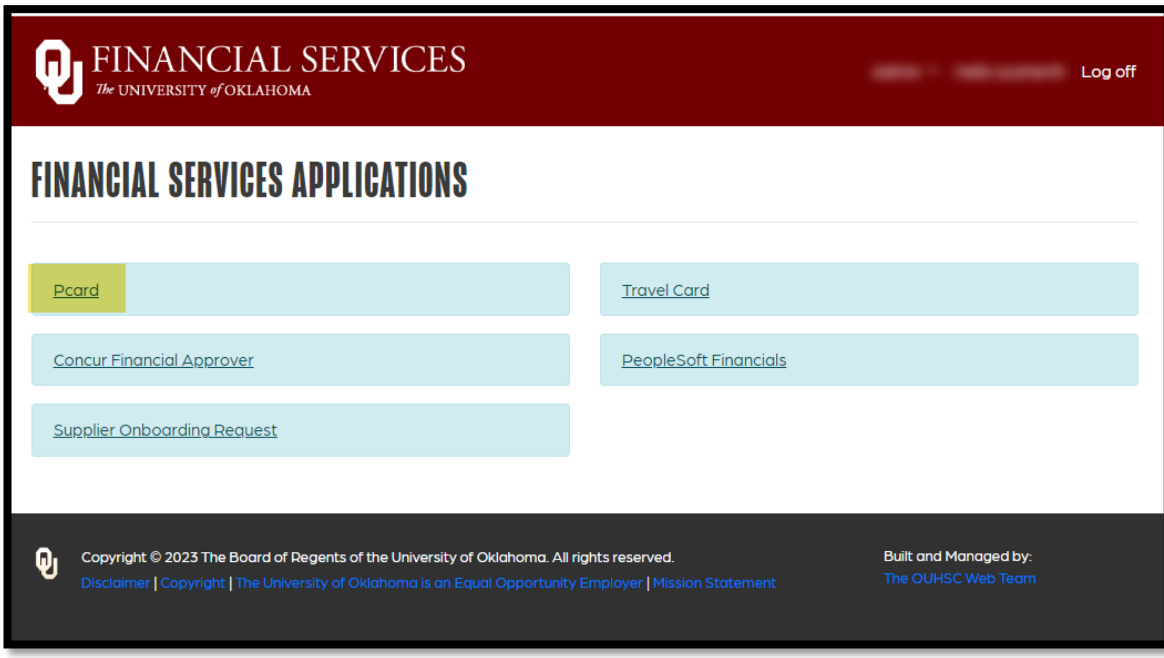
Step	Action
1	**Pcards**, or Procurement Cards, are credit cards that can be issued to full-time university employees to make small-dollar, low-risk purchases. Most departments have a card or two assigned to key personnel to make purchases for their area.
2	To apply for a **Pcard**, go to: **https://apps.ouhsc.edu/FinancialServices/**. Please note that although this is an HSC website, it is used by all campuses for the application process. Once logged in, click on **Pcard**.



Step	Action
3	**Pcard** policy as well as the cardholder agreement will be displayed at the top of the page. Please read this information to ensure you understand the guidelines before proceeding with the application.
4	Your **Name** and **Employee ID** will automatically populate in the **Applicant Information** section. However, this may not reflect your legal name. The name on the application must be listed as it is with Human Resources. If your information does not match HR records, please correct the information populated below as your application cannot be processed unless the names match exactly.

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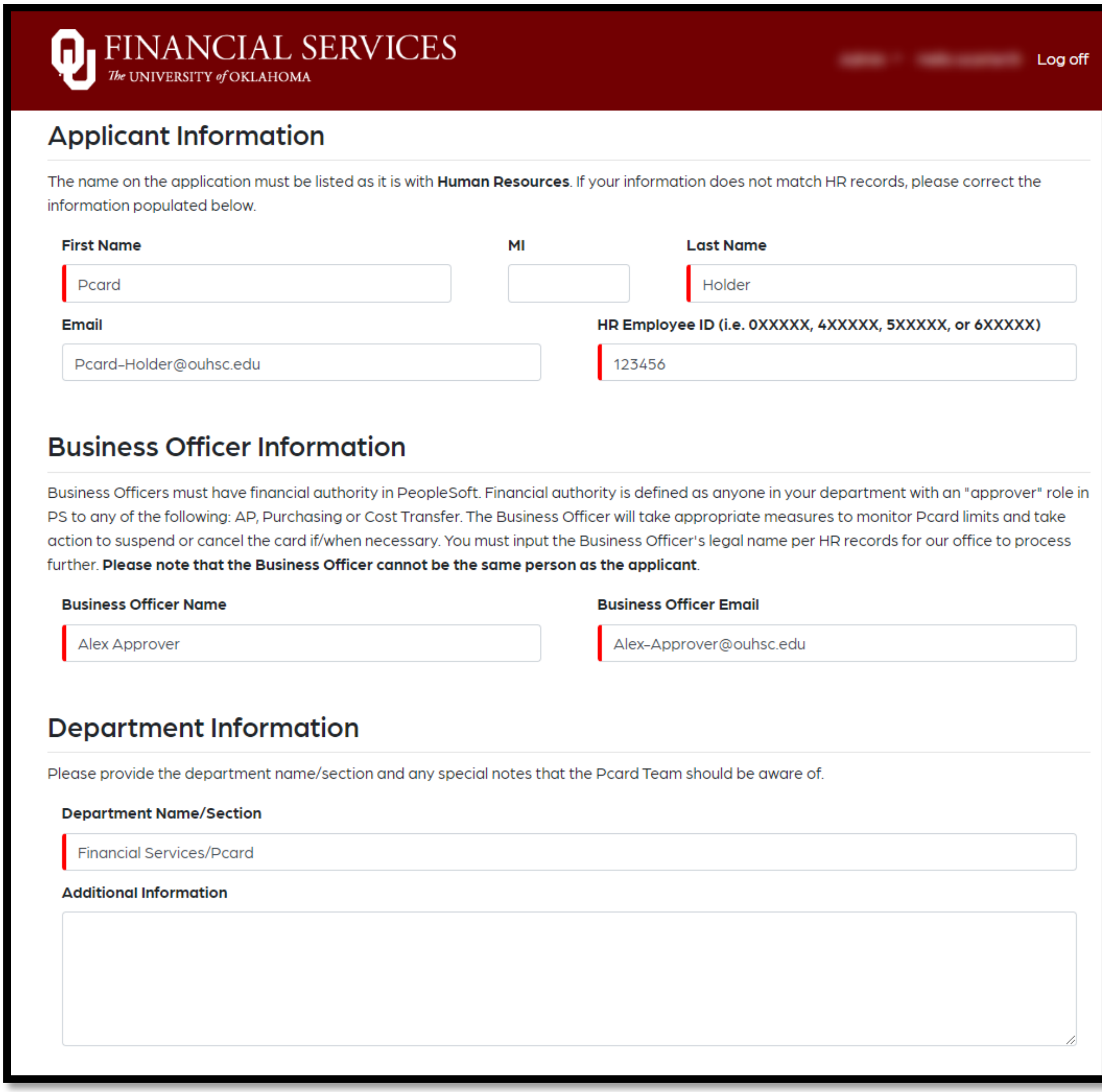
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Applicant Information

The name on the application must be listed as it is with **Human Resources**. If your information does not match HR records, please correct the information populated below.

First Name: Pcard
MI:
Last Name: Holder
Email: Pcard-Holder@ouhsc.edu
HR Employee ID (i.e. 0XXXXX, 4XXXXX, 5XXXXX, or 6XXXXX): 123456

Business Officer Information

Business Officers must have financial authority in PeopleSoft. Financial authority is defined as anyone in your department with an "approver" role in PS to any of the following: AP, Purchasing or Cost Transfer. The Business Officer will take appropriate measures to monitor Pcard limits and take action to suspend or cancel the card if/when necessary. You must input the Business Officer's legal name per HR records for our office to process further. **Please note that the Business Officer cannot be the same person as the applicant.**

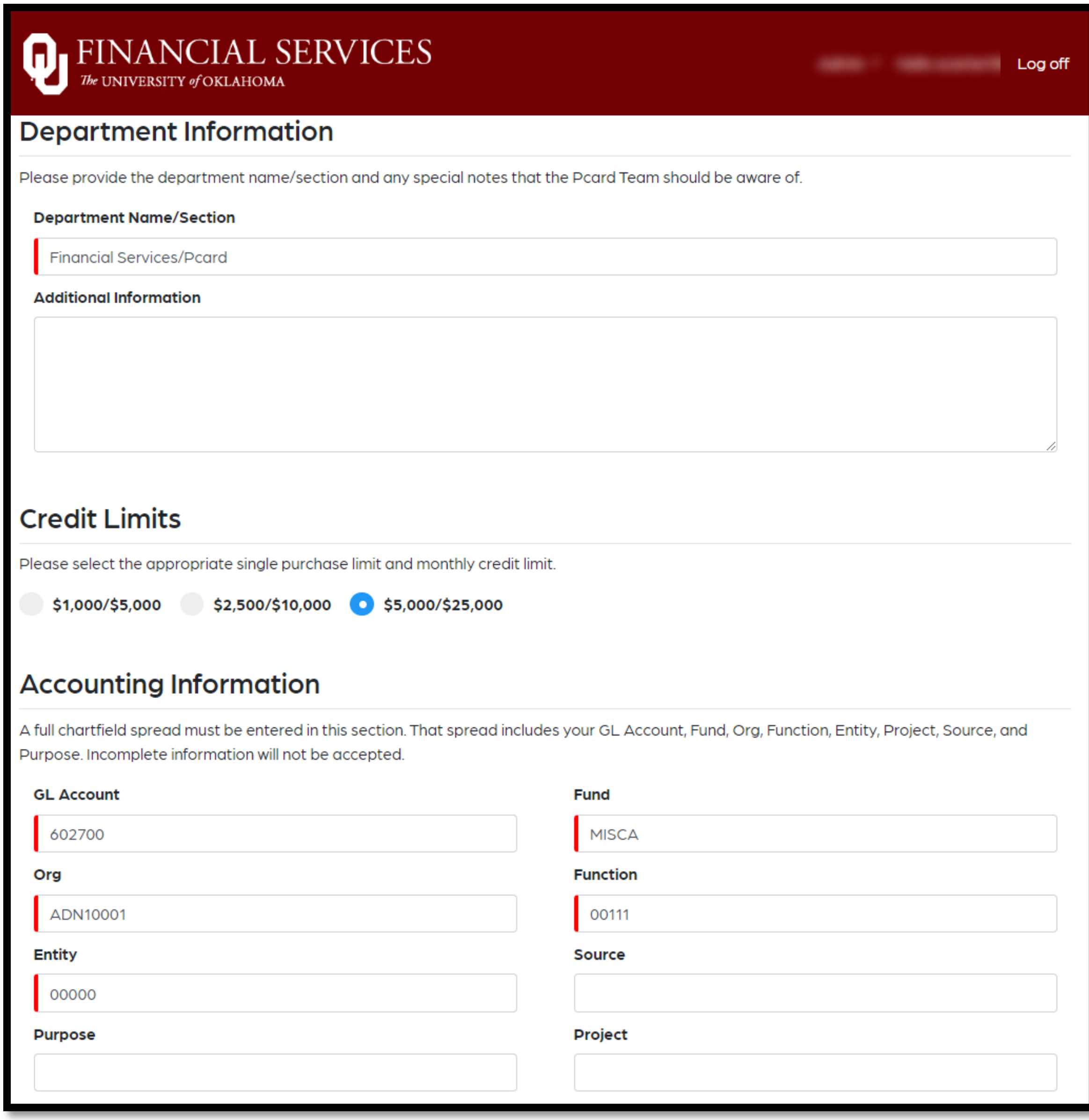
Business Officer Name: Alex Approver
Business Officer Email: Alex-Approver@ouhsc.edu

Department Information

Please provide the department name/section and any special notes that the Pcard Team should be aware of.

Department Name/Section: Financial Services/Pcard
Additional Information:

5	In the **Business Officer Information** section, list your **Business Officer's name** and **email address**. **Business Officers** must have financial authority in PeopleSoft. Financial authority is defined as anyone in your department with an "approver" role in PS to any of the following: AP, Purchasing, or Cost Transfer. The **Business Officer** will take appropriate measures to monitor **Pcard** limits and take action to suspend or cancel the card if/when necessary. You must input the **Business Officer's legal name** per HR records for our office to process further. Please note that the **Business Officer** cannot be the same person as the applicant.
6	In the **Department Information** section, list your **Department Name** and **Section**. Also, if there are any special notes that the Pcard Team should be aware of, list that in the **Additional Information** section.



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Department Information

Please provide the department name/section and any special notes that the Pcard Team should be aware of.

Department Name/Section
Financial Services/Pcard

Additional Information

Credit Limits

Please select the appropriate single purchase limit and monthly credit limit.

( ) $1,000/$5,000 ( ) $2,500/$10,000 (•) $5,000/$25,000

Accounting Information

A full chartfield spread must be entered in this section. That spread includes your GL Account, Fund, Org, Function, Entity, Project, Source, and Purpose. Incomplete information will not be accepted.

GL Account: 602700
Fund: MISCA
Org: ADN10001
Function: 00111
Entity: 00000
Source:
Purpose:
Project:

7	In the **Credit Limits** section, select the most appropriate limit. Note that the first limit listed is the single transaction limit, meaning the maximum amount of money that can be spent per transaction. The second limit is the maximum amount of money that can be spent per billing cycle.
8	In the **Accounting Information** section, enter in the default chartfield spread that all **Pcard** charges will automatically default to. During the reconciliation process in PeopleSoft, this information can be changed, but this chartfield spread is where all charges will automatically be allocated. Please ensure that you are listing a full chartfield spread, including any required Sources, Purposes, or Projects, depending on Fund.
9	In the **Billing Information** section, enter in the required information. Please note that the billing address must be a university address and that building name and room number are required fields.

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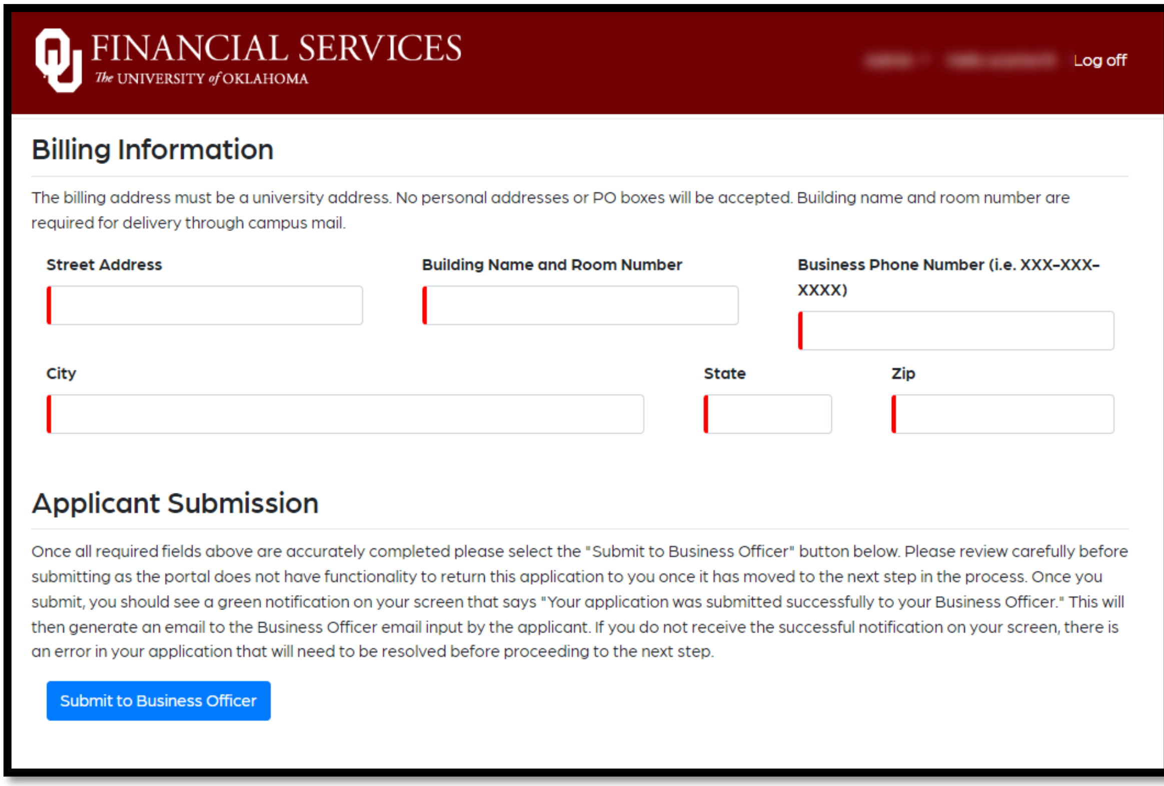
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Billing Information

The billing address must be a university address. No personal addresses or PO boxes will be accepted. Building name and room number are required for delivery through campus mail.

Street Address
Building Name and Room Number
Business Phone Number (i.e. XXX-XXX-XXXX)
City
State
Zip

Applicant Submission

Once all required fields above are accurately completed please select the "Submit to Business Officer" button below. Please review carefully before submitting as the portal does not have functionality to return this application to you once it has moved to the next step in the process. Once you submit, you should see a green notification on your screen that says "Your application was submitted successfully to your Business Officer." This will then generate an email to the Business Officer email input by the applicant. If you do not receive the successful notification on your screen, there is an error in your application that will need to be resolved before proceeding to the next step.

Submit to Business Officer

10	When all required information has been entered, click the **Submit to Business Officer** button. The individual listed on the application as your Business Officer will receive an email notifying them of your application.
11	Business Officers should note that the link in the email is the only way to access the **Pcard** application. If the link is lost or the email is deleted, the applicant must reapply. There is no way to retrieve the original link.
12	Once the Business Officer clicks on the link, they should review the application for accuracy and ensure that the limits listed are appropriate for the job role of the individual. Approvers can either approve or deny the application.
13	If no action is taken by the Business Officer after two weeks, the application will be denied.
14	If the Business Officer approves the application, they should also proceed in submitting the **PeopleSoft Financials Security Form**, through the same website, to grant the applicant access to reconcile their charges in PeopleSoft.
15	Once the application is approved by the Business Officer, it will be processed by **the Pcard Team**. Please note that the **Pcard Team** will submit the application to our bank, Bank of America, for further processing. Cards are created by the bank, not the **Pcard** office, and are usually sent within 3 – 7 business days after approval. There is no ability to rush the cards any sooner than the 3 – 7 business day timeframe.
16	Cards are delivered to the **Pcard** office and applicants will be contacted when their card arrives. Before a card can be distributed, the applicant must take the online **Pcard training** and submit a **Pcard Receipt and Agreement** form.
17	**Pcard training** is available online through the OnPoint system. To complete the online training, login to the OnPoint system. Click on the Library tab on the left side of the screen and search for '**Pcard Training**' in the search bar. Please note that this training session is approximately 45 minutes long and there is a quiz at the end to validate that you have

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	completed the training. Please ensure that you have allotted an appropriate amount of time to complete **Pcard training**.
18	The **Pcard Receipt and Agreement** form is available on the Financial Services Pcard website: **https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard**
19	Please read, sign, date, and return the agreement linked below to either **Pcard@ouhsc.edu** or **Pcard@ou.edu**. Only electronic PDF copies of the signed agreement will be accepted. Agreements can be signed digitally, or they can be printed, signed, and then scanned to the **Pcard** office. Please note that the Pcard office cannot accept agreements with typed signatures.
20	Once the signed agreement has been received, the **Pcard Team** will send your card via campus mail to the address listed on your application. Cards are normally received via campus mail within 5 – 7 business days. The card can also be sent via FedEx, if you can provide your department's FedEx account number.
21	When you receive your card, please call the number on the sticker to activate the card, create a PIN, and sign the back of your card. The instructions in your card envelope will direct you to activate your card online but please **do not** use that option. Instead, call (888) 233-8855 to activate your card. Your card may not be completely activated if you use the online system which may result in your card being declined.
22	During card activation, you may be asked to validate information like your campus zip code, phone number, and/or employee ID. This information will be listed on your **Pcard** application.