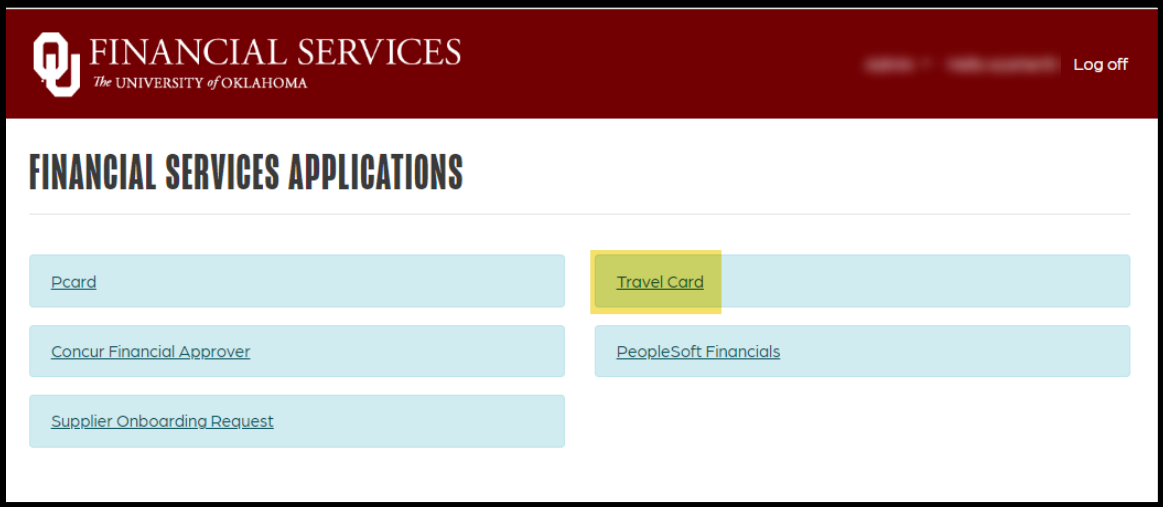




Step	Action
1	<p><b>Travel Cards</b> are credit cards that can be issued to university employees for business travel related charges and business meals. Travel Cards are issued through the Pcard office in Financial Services. Only individuals that have known travel plans or duties involving business meals should apply for a card. Not every employee should be issued a <b>Travel Card</b>.</p>
2	<p>To apply for a <b>Travel Card</b>, go to: <a href="https://apps.ouhsc.edu/FinancialServices/">https://apps.ouhsc.edu/FinancialServices/</a>. Please note that although this is an HSC website, it is used by all campuses for the application process. Once logged in, click on <b>Travel Card</b>.</p>
	
3	<p>Rules surrounding the <b>Travel Card</b> will be displayed at the top of the page. Please read this information to ensure you understand the guidelines before proceeding with the application.</p>
4	<p>Your <b>Name</b> and <b>Employee ID</b> will automatically populate in the <b>Applicant Information</b> 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.</p>



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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.

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>
<input type="text" value="Travel"/>	<input type="text"/>	<input type="text" value="Card"/>
<b>Email</b>		<b>HR Employee ID (i.e. 0XXXXX, 4XXXXX, 5XXXXX, or 6XXXXX)</b>
<input type="text" value="Travel-Card@ouhsc.edu"/>		<input type="text" value="123456"/>

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### 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 is not synonymous with the applicant's Time/Travel Supervisor and is not approving individual travel. They are acknowledging the applicant will be in possession of a Travel Card and that they will take appropriate measures to monitor Travel Card 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.**

<b>Business Officer Name</b>	<b>Business Officer Email</b>
<input type="text" value="Alex Approver"/>	<input type="text" value="Alex-Approver@ouhsc.edu"/>

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### Department Information

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

**Department Name/Section**

**Additional Information**

<b>5</b>	In the <b>Business Officer Information</b> section, list your <b>Business Officer's name</b> and <b>email address</b> . <b>Business Officers</b> 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 <b>Business Officer</b> will take appropriate measures to monitor <b>Travel Card</b> limits and take action to suspend or cancel the card if/when necessary. You must input the <b>Business Officer's legal name</b> per HR records for our office to process further. Please note that the <b>Business Officer</b> cannot be the same person as the applicant.
<b>6</b>	In the <b>Department Information</b> section, list your <b>Department Name</b> and <b>Section</b> . Also, if there are any special notes that the Pcard Team should be aware of, list that in the <b>Additional Information</b> section.



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### Credit Limits

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

\$500/\$5,000   
  \$2,500/\$5,000   
  \$5,000/\$5,000

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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.

<b>Street Address</b>	<b>Building Name and Room Number</b>	<b>Business Phone Number (i.e. XXX-XXX-XXXX)</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<b>City</b>	<b>State</b>	<b>Zip</b>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

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### 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](#)

<b>7</b>	In the <b>Credit Limits</b> 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.
<b>8</b>	In the <b>Billing Information</b> 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.
<b>9</b>	When all required information has been entered, click the <b>Submit to Business Officer</b> button. The individual listed on the application as your Business Officer will receive an email notifying them
<b>10</b>	Business Officers should note that the link in the email is the only way to access the <b>Travel Card</b> application. If the link is lost or the email is deleted, the applicant must reapply. There is no way to retrieve the original link.
<b>11</b>	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.
<b>12</b>	If no action is taken by the Business Officer after two weeks, the application will be denied.
<b>13</b>	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.
14	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 <b>Travel Card training</b> and submit a <b>Travel Card Receipt and Agreement</b> form.
17	<b>Travel Card training</b> 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 ' <b>Travel Card Training</b> ' in the search bar.
18	The <b>Travel Card Receipt and Agreement</b> form is available on the Financial Services Pcard website: <a href="https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard">https://financialservices.ouhsc.edu/Departments/Accounts-Payable/Pcard</a>
19	Please read, sign, date, and return the agreement linked below to either <a href="mailto:Pcard@ouhsc.edu">Pcard@ouhsc.edu</a> or <a href="mailto:Pcard@ou.edu">Pcard@ou.edu</a> . 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 <b>do not</b> 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 <b>Travel Card</b> application.