Purchasing Card (Pcard)

HOW TO GET A UF PCARD: http://purchasing.ufl.edu/departments/pcard/default.asp

Send an email to Fiscal@ise.ufl.edu with your request and reason for needing a Pcard. It will be reviewed by the Department Chair and approved or declined via email. If you receive approval email, you can proceed with the below steps.

To apply for a PCard:

- Complete the PCard online training courses with passing scores
- Complete a Cardholder Agreement
- Complete a PCard Application
- Send the signed PCard Application and Cardholder Agreement to Fiscal@ise.ufl.edu. We will obtain the Department Chair's signature and submit your application to the UF PCard Team.

What do I do when I get my new card?

- Check that your name is spelled correctly. If not notify the PCard Team

- Sign the back of the card. DO NOT PUT "See ID". Cards are not valid unless they are signed by the cardholder

- Activate the card - there are two activation options.

    - Send an email to pcard@ufl.edu requesting the PCard Team activate your card. Do NOT email the card number – all we need is your name and UFID. We will email you once the card has been activated.

    - Or, call the phone number on the white sticker located on the front of the card. The activation code is zero followed by your UFID.

MONETARY LIMITS:

- ***Single transaction limit is $2,000***

- ***Monthly total limit is $10,000***

PCARD BASIC RULES (failure to comply can result in losing your Pcard, see suspension policy):

- Receipt submitted within **5 days of purchase**

- The University's policy is that all PCard transactions are to be approved in **15 calendar days** or less.

- Do not split transactions to avoid the $2,000 transaction limit. *Contact Fiscal@ise.ufl.edu to purchase something higher than $2,000*

- If charged tax please send an email to the vendor requesting a tax refund, submit the email with your receipt.

- Do not use a personal or non-UF affiliated address for shipping items

- Do not use it for food purchases or personal items (toaster, coffee maker, mini fridge, travel upgrades, etc.). For a list of allowable or non-allowable items visit http://www.purchasing.ufl.edu/departments/pcard/procedures/allowable.asp

PCARD SUSPENSION POLICY:

Within our department if improper use of your Pcard occurs 3 times then your Pcard will be suspended and under review for reinstatement. Examples of items that could result in 1 occurrence include, but are not limited to the above "PCARD BASIC RULES". Each occurrence will be tracked by our fiscal team and discussed with the Department Chair. You will be notified what the offense was and what number occurrence. Once you reach the third occurrence we will contact UF Pcard to suspend your Pcard until further notice.

SUBMITTING RECEIPTS:

- Scan and submit online via the web form, or to Fiscal@ise.ufl.edu, another option is to hand in the hard copy.

Information to accompany your receipt:

- Pcard Holder Name

- Description of items purchased

- Fund/account

- Justification/Benefit to state or fund.

OTHER ITEMS OF IMPORTANCE:

- Billing Address - The address associated with your card is the address where the card was sent and can be found on the page your PCard came attached to. Keep that page in a secure but convenient place - it has your card number on it and the number to call if your card is lost or stolen.

- Tax Exemption Certificate – Get a wallet sized tax Consumer's Certificate of Exemption (Tax Exempt Certificate) from your department's PCard/fiscal office or the PCard Team. You can find a full-size version at the link above.

- How to purchase from AMAZON: https://procurement.ufl.edu/uf-departments/how-to-purchase-from-amazon-business/

- When traveling internationally you will need to call the bank 1-2 business days prior to traveling, using the number on the back of the card, and provide the location and dates you will be using it.

- Receipt replacement form to use when a receipt is lost (to use only when all other options have been exhausted): Replacement Receipt Form
- Dispute a charge form & directives: http://www.purchasing.ufl.edu/departments/pcard/procedures/default.asp#disputes