Purchasing Card (PCard) Application Process

The PCard is a corporate credit card, designed to allow UM departments flexibility when purchasing authorized commodities under $2,500.

Use this guide to apply for a PCard.

Before Application Process: The PCard is a corporate credit card, designed to allow UM departments flexibility when purchasing authorized commodities under $2,500.

Check if the following apply:

- Cardholder department leaving or there is no cardholder in the department currently.
- A full time University employee
- The Cost Center and Department must have all cardholder’s accounts in good standing. If there are transactions over 61 days old and card are suspended the for a new card will be denied
- Successfully completes the online course Purchasing (PCard) training with a score of 100%.
- When applying for a PCard the requestor must agree to comply 100% with all University Corporate Card rules, regulations, and policies. The cardholder’s first year will be considered a probationary period. Should the card be misused at any time, the cardholder could potentially face disciplinary action intervention by Human Resources and card cancellation.
- Business Justification validated by Supervisor and Cost Center Manager/Senior Business Manager

PCard Application Steps

1. Email pcard.ap@miami.edu. Include the following information:
   - Applicant’s full name
   - Applicant’s department
   - “Requesting a PCard application”

2. Applicant completes the ULearn course Purchasing Card Education (U.S. Bank) with a score of 100%.
   TIP: Chrome is the preferred browser

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Purchasing Card Education (U.S. Bank)
Online Class | University of Miami | $0.00

pcard.ap@miami.edu  Purchasing.miami.edu  7/24/23
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3. Both the applicant and applicant’s supervisor will need to send separate emails to pcard.ap@miami.edu

Include the following information:
- A signed PCard Responsibilities Agreement Form (sent by both applicant and supervisor)
- Type “I accept responsibility for the use of the PCard” (sent by both applicant and supervisor)

4. The Corporate Cards office will request U.S. Bank to send the applicant the instructions and link to the online application.

- The applicant should watch for an email from “U.S. Bank email.
- When completing

<table>
<thead>
<tr>
<th>Home delivery address</th>
<th>UM delivery address</th>
</tr>
</thead>
<tbody>
<tr>
<td>@miami.edu</td>
<td>@med.miami.edu</td>
</tr>
<tr>
<td>@rsmas.miami.edu</td>
<td>@law.miami.edu</td>
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**TIPS for Application Form**

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<thead>
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<th>Field Name</th>
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<tbody>
<tr>
<td>Account Owner’s Information</td>
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<tr>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td>Optional 2</td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>Social Security Number</td>
<td></td>
</tr>
</tbody>
</table>

Enter Employee ID (E.g., 5xxxxxx)
Find Employee ID in Workday
(Cardholder’s work or home address)
(Enter 5 zeros, followed by the last 4 digits of the Workday employee ID. E.g., 000-00-####)

For questions, contact pcard.ap@miami.edu.