



Checklist

PCard Applications/Transfers

CH = Cardholder (Individual PCard)
RCH = Responsible Cardholder (Dept. PCard)

- ___ CH/RCH "ACTIVE PAID UA EMPLOYEE" IN THE UACCESS FINANCIAL SYSTEM
- ___ CH/RCH COMPLETED/PASSED THE PCARD POLICY REVIEW & EXAM (JULY 25, 2017)
- ___ CH/RCH COMPLETED THE INFORMATION SECURITY AWARENESS TRAINING VIDEO/ACKNOWLEDGMENT (ANNUAL REQUIREMENT)
- ___ CH/RCH LEGAL NAME AS LISTED IN UACCESS FINANCIALS IS LISTED *NO NICKNAMES
- ___ APPLICATION IS FROM APPLICANT'S HOME DEPARTMENT
*IF NOT, JUSTIFICATION NEEDS TO BE DOCUMENTED BY BOTH DEPARTMENTAL LIAISONS (NEW APPLICATION ONLY)
- ___ INDIVIDUAL APPLICATION – HOME ADDRESS, COUNTRY OF CITIZENSHIP
- ___ DEFAULT ACCOUNT# IS WITHIN THE DEPARTMENT APPLICATION IS BEING SUBMITTED FROM (NEW APPLICATION ONLY)
- ___ NO SPONSORED PROJECT/AGENCY ACCT# LISTED AS DEFAULT ACCT# (NEW APPLICATION ONLY)
- ___ ENHANCEMENTS HAVE BEEN REVIEWED AND SELECTED BASED ON NEED (NEW APPLICATION ONLY)
- ___ LIMITS BEING REQUESTED SELECTED **BASED ON NEED** (NEW APPLICATION ONLY)
- ___ RECONCILER WORKGROUP NAME AND GROUP # ARE LISTED
* FAQ'S CONTAIN METHOD FOR SEARCH IF UNKNOWN
- ___ CH/RCH IS NOT ALSO A RECONCILER ALONE IN WORKGROUP
- ___ ALL FIELDS ON APPLICATION/TRANSFER ARE COMPLETED
- ___ CH/RCH REVIEWED AND **ORIGINAL** SIGNATURE OBTAINED *IN ORDER AS LISTED
- ___ DEPARTMENT HEAD **ORIGINAL** SIGNATURE OBTAINED * IN ORDER AS LISTED
- ___ LIAISON **ORIGINAL** SIGNATURE OBTAINED * REVIEWS ALL AND SIGNS LAST
- ___ ORIGINAL APPLICATION/TRANSFER SENT TO PCARD ADMINISTRATION OFFICE
USA BUILDING 300A 5TH FLOOR - PCARD OFFICE

Once PCard has been Received or Department PCard Transferred

- ___ ACTIVATION FORM/ACKNOWLEDGEMENT FORM FAXED TO 520-621-1245
- ___ ANY ADDITIONAL STEPS ON FORM COMPLETED

DO NOT SUBMIT THIS FORM