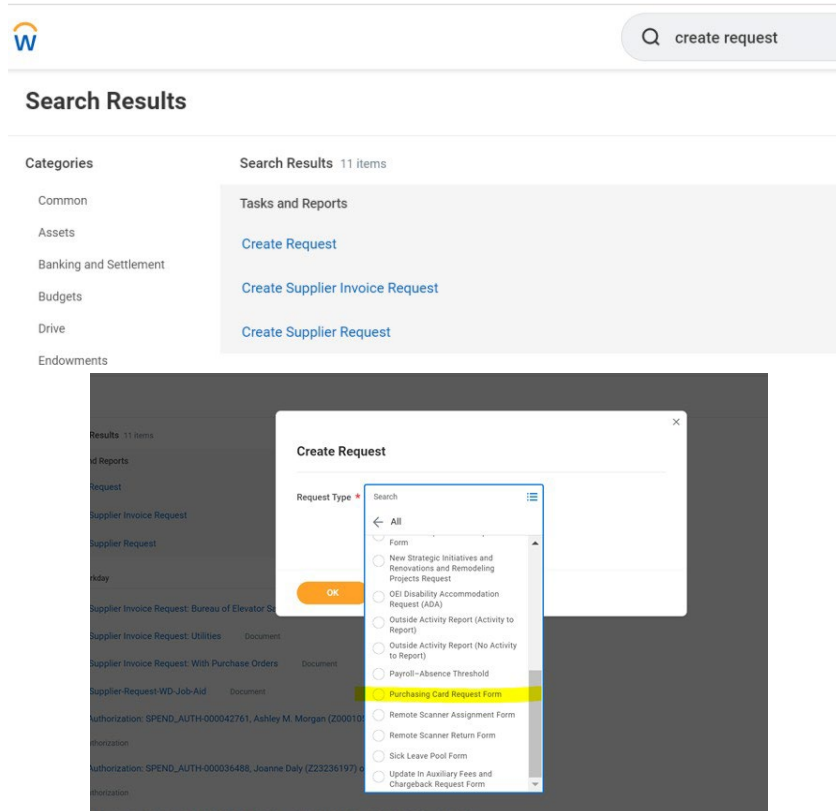


How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card

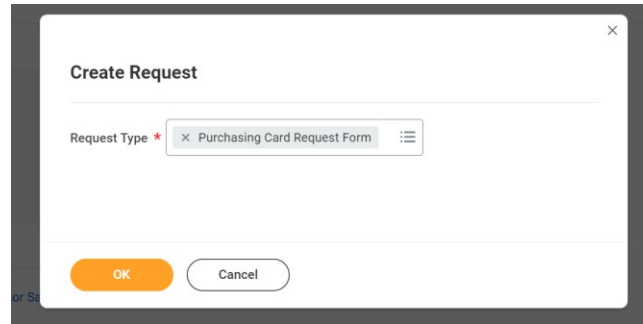


1. In Workday - Search for Create Request



How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card



2. Completing the Purchasing Card Request Form:

- A – Date of Request – Today’s Date;
 - B - Name of Employee Requesting Purchasing Card;
 - C – Z# of Employee Requesting Purchasing Card;
 - D - Name of Supervisor for Employee Requesting Purchasing Card;
 - C – Z# of Supervisor for Employee Requesting Purchasing Card
- See example below

Date of Request (Required)

04 / 18 / 2022

Enter employee's full name. (Required)

Ilyse Wertheim

Provide employee's Z number (e.g. Z12345678). (Required)

Z15032045

Enter full name of employee's supervisor. (Required)

Stacey Bell

Provide Z number of employee's supervisor (e.g. Z12345678). (Required)

Z00017132

How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card



3. Select your Purchasing Card(s):

Please select purchasing card(s). Choose one option. (Required)

- FAU: VISA pCard (Commodities Only)
- FAU: VISA pCard (Commodities & Travel)
- FAU Foundation: MASTERCARD eCard
- FAU: VISA pCard (Commodities Only) & FAU Foundation: MASTERCARD eCard
- FAU: VISA pCard (Commodities & Travel) & FAU Foundation: MASTERCARD eCard

4. Review the Applicable Purchasing Card Policies & Procedures

- Copy and paste the following into search bar to review:

- FAU: <https://www.fau.edu/controller/documents/travel/expense-travel-policies-and-procedures.pdf>

- FAUF: https://fauf.fau.edu/sites/default/files/fau_docs/foundation%20travel-expense-reference-guide-for-employees_1.pdf

5. Agree to the Policies & Procedures by Selecting "I Certify":

I AGREE TO THE FOLLOWING REGARDING THE USE OF THE PURCHASING CARD ASSIGNED TO ME FOR OFFICIAL STATE BUSINESS (pCard) commodities and/or travel and/or for FAU FOUNDATION BUSINESS (eCard) ONLY:

1. I understand that I am being entrusted with a powerful and valuable tool and will be making financial commitments on behalf of the STATE OF FLORIDA and/or the FAU FOUNDATION (FAUF) and will strive to obtain the best value for the STATE.
2. I understand that under no circumstances will I use the Purchasing Card (pCard and/or eCard) to make personal purchases, either for myself or others. Willful intent to use the Purchasing card (pCard and/or eCard) for personal gain or unauthorized use may result in disciplinary actions up to and including termination of employment and prosecution to the extent permitted by law.
3. I will follow Florida Law and FAU purchasing policies and/or FAUF policies, and established guidelines for using each of the Purchasing Cards, if applicable. Failure to do so may result in either revocation of my card privileges or other disciplinary action.
4. I agree to review and reconcile transactions timely and will maintain all applicable information and receipts in accordance with FAU and FAUF policies.
5. I agree that, should I violate the terms of the Agreement, I will be subject to disciplinary action up to and including termination of employment and, that I will reimburse FAU and/or FAUF for all incurred charges and any costs related to the collection of such charges. Additionally, any such charges that I owe may be deducted from any money which would otherwise be due and owing me, including salary or wages, in accordance with Rule 3A-21.004, F.A.C.
6. I acknowledge that I have access in Workday to the applicable FAU and/or FAUF Purchasing Card Procedures Manual.

How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card



7. I understand that if my card allows for travel that all University travel on the pCard shall comply with Section 112.061, Florida Statutes and the guidelines established by FLORIDA ATLANTIC UNIVERSITY and all FAUF travel shall comply with the guidelines established by the FAU FOUNDATION. A summary of the travel guidelines are available online using the links below.
8. I acknowledge that I will attend the applicable Purchasing Card Training for FAU and/or FAUF for commodities and/or travel training when scheduled and that attending training is a prerequisite to receiving the applicable program Purchasing Cards.
9. Upon the completion of the applicable Purchasing Program and/or Travel Training, I attest that I understand the applicable Purchasing Program and have been given the opportunity to ask any questions to clarify my understanding.
10. I understand that I cannot take out any cash advances on either the pCard or eCard. (Required)

I AGREE TO THE FOLLOWING REGARDING THE USE OF THE PURCHASING CARD ASSIGNED TO ME FOR OFFICIAL STATE BUSINESS (pCard) commodities and/or travel and/or for FAU FOUNDATION BUSINESS (eCard) ONLY:

1. I understand that I am being entrusted with a powerful and valuable tool and will be making financial commitments on behalf of the STATE OF FLORIDA and/or the FAU FOUNDATION (FAUF) and will strive to obtain the best value for the STATE.
2. I understand that under no circumstances will I use the Purchasing Card (pCard and/or eCard) to make personal purchases, either for myself or others. Willful intent to use the Purchasing card (pCard and/or eCard) for personal gain or unauthorized use may result in disciplinary actions up to and including termination of employment and prosecution to the extent permitted by law.
3. I will follow Florida Law and FAU purchasing policies and/or FAUF policies, and established guidelines for using each of the Purchasing Cards, if applicable. Failure to do so may result in either revocation of my card privileges or other disciplinary action.
4. I agree to review and reconcile transactions timely and will maintain all applicable information and receipts in accordance with FAU and FAUF policies.
5. I agree that, should I violate the terms of the Agreement, I will be subject to disciplinary action up to and including termination of employment and, that I will reimburse FAU and/or FAUF for all incurred charges and any costs related to the collection of such charges. Additionally, any such charges that I owe may be deducted from any money which would otherwise be due and owing me, including salary or wages, in accordance with Rule 3A-21.004, F.A.C.
6. I acknowledge that I have access in Workday to the applicable FAU and/or FAUF Purchasing Card Procedures Manual.
7. I understand that if my card allows for travel that all University travel on the pCard shall comply with Section 112.061, Florida Statutes and the guidelines established by FLORIDA ATLANTIC UNIVERSITY and all FAUF travel shall comply with the guidelines established by the FAU FOUNDATION. A summary of the travel guidelines are available online using the links below.

Copy and paste the following into search bar to review:

- FAU: <https://www.fau.edu/controller/documents/travel/expense-travel-policies-and-procedures.pdf>
- FAUF: https://fauf.fau.edu/sites/default/files/fau_docs/foundation%20travel-expense-reference-guide-for-employees_1.pdf

8. I acknowledge that I will attend the applicable Purchasing Card Training for FAU and/or FAUF for commodities and/or travel training when scheduled and that attending training is a prerequisite to receiving the applicable program Purchasing Cards.
9. Upon the completion of the applicable Purchasing Program and/or Travel Training, I attest that I understand the applicable Purchasing Program and have been given the opportunity to ask any questions to clarify my understanding.
10. I understand that I cannot take out any cash advances on either the pCard or eCard. (Required)

- I certify.
- I do not certify.

6. To MAKE CHANGES to your Purchasing Card:

If you currently have a purchasing card, please review modifications below and select option(s) which apply.

☰

7. SELECT the APPROPRIATE CHANGE BOX and ENTER FILL IN THE BOX

How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card



- MODIFY Existing Employee Profile: Request to Receive New Purchasing Card (upload training certificate in supporting documentation section)
- MODIFY Existing Employee Profile: Request to Change Employee Name
- MODIFY Existing Employee Profile: Request to Permanently Increase Credit Limit
- MODIFY Existing Employee Profile: Request to Temporarily Increase Credit Limit for a 30 day period (30 days from date of request)
- MODIFY Existing Employee Profile: Request to Permanently Increase Single Transaction Limit
- MODIFY Existing Employee Profile: Request to Close Account due to Employee Termination or FAU Job Change
- OTHER

Enter related information in the text box below. Each of the items below need to be addressed.

- Request to Permanently Increase Credit Limit: Enter the current credit limit and the new credit limit with the permanent increase. Please also provide the difference of these two amounts.
- Request to Temporarily Increase Credit Limit for a 30 day period (30 days from date of request): Enter the current credit limit and the new credit limit with the temporary increase. Please also provide the difference of these two amounts.
- Request to Permanently Increase Single Transaction Limit: Enter the current limit and the new limit with the permanent increase for a single transaction. Please also provide the difference of these two amounts.
- Other Request: If other, please provide reason for request.

How To Request a Purchasing Card:

- FAU Foundation MASTERCARD E-Card;
AND/OR
- Florida Atlantic University VISA P-Card



8. PROVIDE the SMARTAG in the BOX:

FAUF – FND ST

FAU – TAG ST

9. UPLOAD SUPPORTING DOCUMENTATION (PDF or Excel only) for this request.

Note: A training certificate with the completion date must be provided.

Drop files here

or

Select files

10. SUBMIT

Submit

Save for Later

Cancel