



## Purchasing Card Application, Activation, and Registration

Procedure # 3013.1; Rev. 2 (Effective May 8, 2017)

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**Related Policy:** [UW-3013 Purchasing Card Policy](#)

**Functional Owner:** Accounting Services, Division of Business Services

**Contact:** Purchasing Card Program Administrator: (608) 262-3300, [meghann.grove@wisc.edu](mailto:meghann.grove@wisc.edu)

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### I. Procedure statement

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The UW–Madison purchasing card is a VISA card issued through and supported by U.S. Bank. The card is sponsored by the employing department and is authorized for use for UW–Madison business only. The Purchasing Card Program Office in the Division of Business Services administers the Purchasing Card (PCard) Program. To obtain a purchasing card, an employee must complete PCard Request Form and attend mandatory training. All applications are subject to the approval of the applicant’s supervisor, the Divisional Business Office, a Purchasing Card Program Administrator, and in some cases, the Office of Research and Sponsored Programs (RSP). After receiving a purchasing card, the employee must activate the card. Details are outlined below.

### II. Who is affected by this procedure

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Employees who apply for purchasing cards; site managers; Divisional Business Office staff; the Division of Business Services Purchasing Card Program Administrator; Research and Sponsored Programs (RSP) staff.

### III. Procedure

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- A. **Card application:** Applications for a purchasing card must be completed and submitted through the PCard Request Form, an electronic purchasing card application available in the [Shared Financial System \(SFS\)](#). The PCard Request Form tile can be found on the SFS homepage:



1. To begin a new application, click **Add a New Pcard eForm** on the Pcard Request Landing Page.
2. Review the pre-populated demographic information, updating any fields as necessary. Be sure to add a room/office number (if applicable). Complete the required default funding and account limit fields. Review the list of Purchasing Card Transaction Approvers. These individuals are established Site Managers responsible for reviewing and approving purchasing card transactions for the indicated Department ID. Review the **Purchasing Card Agreement** and toggle the switch to indicate agreement. Click **Submit**.
3. The submitted application is electronically routed for approvals.

#### **B. Approval process:**

1. **Supervisor approval:** The supervisor reviews the application. Supervisors may "Deny" the application to eliminate it from the approval workflow or "Recycle" the application to send it back to the applicant for editing and resubmission. If the application is not approved, an automated email is sent notifying the applicant the application was not approved. If the application is approved, it is routed to the Divisional Business Office.
2. **Divisional Business Office approval:** The Divisional Business Office reviews the application. If the application is not approved, an automated email is sent notifying the applicant the application was not approved. If the application is approved, it is routed to the Purchasing Card Program Administrator or, if the requested default funding includes a sponsored project, to the Office of Research and Sponsored Programs.
3. **Office of Research and Sponsored Programs approval (only required if default funding includes a sponsored project):** The Office of Research and Sponsored Programs reviews the application for the appropriateness of using sponsored funds (133/144) as the default funding source.
  - a. If the application is not approved, an automated email is sent notifying the applicant the application was not approved.
  - b. If the application is approved, it is routed to the Purchasing Card Program Administrator.
4. **Purchasing Card Program Administrator approval:** The Purchasing Card Program Administrator reviews the application and confirms whether the applicant is eligible to receive a purchasing card based on prior audit or monitoring findings.
  - a. If the applicant is ineligible, the Purchasing Card Program Administrator notifies the applicant, the site manager, and the Divisional Business Office that the application was not approved.
  - b. If the applicant is eligible, the Purchasing Card Program Administrator verifies the applicant has completed the required training.
  - c. If the applicant has not completed the required training, the Purchasing Card Program Administrator notifies the applicant of the training requirement and retains the application without ordering the purchasing card from U.S. Bank.
  - d. If the applicant has completed the required training, the Purchasing Card Program Administrator approves the application and orders the card from U.S. Bank.

- C. **Training:** Before the Purchasing Card Program Administrator orders a purchasing card from U.S. Bank, the applicant must complete Purchasing Card Policies and Procedures training and UW–Madison Travel Policy Training. Registration details are available in the [Purchasing Card webpage's Training section](#).
- D. **Card distribution:** U.S. Bank mails the purchasing card directly to the applicant at the address indicated on the PCard Request Form. Cards may be returned to sender as "undeliverable" if the provided address was not complete (e.g., missing room number).
- E. **Card activation:** Cards may be activated online or via phone:
1. **Online:**
    - a. Visit the [U.S. Bank Access Online site](#) and click Activate Your Card. (You do not need to login.)
    - b. Enter the requested information (card number, expiration date, last 4 digits of business phone number).
    - c. The cardholder will be sent two emails to the email address on file for the account (included on application); one email with a unique activation link and another with an activation code. Follow the link in the first email to enter the code from the second email. The link and activation code are valid for 20 minutes. If this time lapses, the cardholder should begin the process again.
  2. **Phone:**
    - a. Contact U.S. Bank Customer Service at (800) 344-5696.
    - b. When prompted for the last four digits of the Social Security number or Employee ID, enter four zeroes (0).
- F. **Real-time alerts:** To enroll in real time alerts via text message or email, see [Procedure 3013.8 - How to Enroll in Real-Time Alerts](#).

#### IV. Contact Roles and Responsibilities

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- **Applicant/Cardholder:** responsible for applying, completing the mandatory purchasing card training, activating the card, and registering the card in Access Online.
- **Supervisor:** responsible for reviewing and approving the application.
- **Divisional Business Office:** responsible for reviewing and approving the application (review includes default funding and credit limits).
- **Office of Research and Sponsored Programs:** responsible for reviewing the application for the appropriateness of using sponsored funds (133/144) as the default funding source.
- **Purchasing Card Program Administrator:** responsible for reviewing the application for eligibility, ordering the card from U.S. Bank, training, and retaining documentation.
- **U.S. Bank:** responsible for processing the card request, producing the card, sending the card to the applicant.

#### V. Definitions

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- **Access Online:** U.S. Bank's web-based transaction management tool used by the Purchasing Card Program Administrators to maintain the purchasing card program at UW–Madison and by purchasing cardholders to manage account settings.
- **Site manager:** the individual who manages purchasing cards at the departmental or divisional level.
- **Purchasing Card Program Administrator:** the individual appointed by the Accounting Services unit in the Division of Business Services to manage, coordinate, and control purchasing cards for campus.

## VI. Related references

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- [UW-3013 Purchasing Card Policy](#)
- [Procedure 3013.2: Purchasing Card Use and Account Management](#)
- [Procedure 3013.3: Purchasing Card Deactivation](#)

## VII. Revisions

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Procedure Number	3013.1
Date Approved	May 8, 2017
Revision Dates	<p>June 21, 2017 – remove Travel Card training option</p> <p>March 28, 2018 – add role of applicant's Supervisor in Section I Procedure Statement and Section III Procedure</p> <p>May 4, 2018 – Updated card distribution process; purchasing cards are delivered directly to the applicant</p> <p>Jan. 19, 2021 - Updated Procedure Number to 3013.1 from 300.1</p> <p>December 11, 2021 – Purchasing Card Module implementation</p> <p>September 2, 2022 – Updated to replace "Purchasing Card Application and Agreement" with new "PCard Request Form."</p> <p>Feb. 22, 2023 – Cardholder signature no longer required.</p> <p>Sept. 11, 2023 – New, required UW Travel Policy Training available.</p>