

Applying for an FAU pCard

Step 1: Determine whether pCard Approvers are currently operating in your area. If you are not sure, please contact the Purchasing Department at x73081. If you already have pCard Approvers operating in your area, proceed to Step 2; otherwise, read on.

Each area requires a primary pCard Approver and a backup Approver. Approvers are responsible for online transaction approval, a monthly reconciliation process and record retention. If you are starting a new pCard program in your area, Approvers can be identified and authorized by completing the Reconciler/Approver Profile Information Form¹ and sending it to the Purchasing Department. Initial program activation requires approval from a Dean, Director or Department Head.

Important: Under the guidelines of the program, Cardholders are prohibited from approving their own charges. Therefore, Cardholders can not also serve as area Approvers.

Step 2: Complete forms: Cardholders should sign-up for the program by completing the Cardholder Agreement Form¹ and the Cardholder Profile Information Form¹. If you plan to use the pCard for travel, you must also complete the Travel Addendum Form¹. Send all forms to the Purchasing Department for processing.

Step 3: Attend Training: Once you have submitted the required forms, you will be contacted by the appropriate program staff to schedule training:

Approver applicants will be contacted by the Controller's Office to arrange for a hands-on training class (approximately 1 hr) on the SAMAS/FLAIR module.

Cardholder applicants will be contacted by the Purchasing Department to arrange for a general policies training class (approximately 30 minutes). If you have requested a commodities only pCard (no travel), you will be given an activated card at the completion of this training class.

Cardholder applicants who have also requested travel privileges will be contacted by the Controller's Office for an additional training class on travel guidelines (approximately 30 minutes). The activated travel card will be ready for pick-up after completion of this step.

¹All forms are available online at <http://www.fau.edu/purchasing/forms.php>