PALCard Application (PCAP)

Instructions for Applicants

**Note:** All PALCard training and testing must be completed before submitting a PALCard application. Training is available at: Portal > Finances/KFS > Purchasing > PALCard > Low Value e-Training

*Applicants should know which account number the card will be linked to before completing the application.

**Step 1: Access the Portal**

A. Go to [https://portal.uci.edu](https://portal.uci.edu), log in and navigate to Finances/KFS.  
B. Locate the Purchasing portlet.  
C. Select Procurement Card (PALCard) Application.

![UCI Portal](image)

**Step 2: Document Header**

A. Write down the document number (Doc Nbr) for future reference.  
   - Used to look up and retrieve the application.  
B. Users can toggle between expand all and collapse all to manage viewing of information on their screen.
Step 3: Document Overview

A. The **Description** field auto-populates based on user log in. Do not change the name—the UCInetID must match the employee name displayed in the field. Employees must initiate their own application.

B. Use the **Explanation** field if applying for a second card (only for split appointment between two departments).

Step 4: Cardholder Information, Billing Address, Reconciler Group

A. **Cardholder Information** auto-populates and cannot be changed.

B. **Billing Address** information auto-populates for most employees and cannot be changed. If this section is blank, or the data is incorrect, enter your department name, UCI office address, phone number, and email in the **Explanation** field of the **Document Overview** tab.

C. The **Reconciler Group** tab is blank at this stage of the application. The Fiscal Officer is responsible for completing this tab.

Information for A and B is retrieved from the Payroll Database. If the information is incorrect, contact the Payroll Department to make corrections, 949.824.4568.
Step 5: Default Accounting Line

A. In the **Chart Code** field, IR (UC Irvine), MC (Medical Center), or SW (Systemwide) auto-populates based on user’s profile.

B. In the **Account Number** field, select 🎷 to view the **Account Lookup** page.
   - Users can type account information directly in the field, if known. Lookup instructions are listed below.

C. Type 8150 in the **Object Code** field.
   - 8150 (Supplies Gen Office) is used for the majority of PALCards and Managed Spend cards.
   - When appropriate, a different default Object Code can be selected, e.g. 8090 (Lab Supplies, Non-Animal).

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**DEFAULT ACCOUNTING LINE**

![Chart Code: IR](chart_code.png)

![Account Number:](account_number.png)

Sub-Account Number: 

Sub-Object Code: 

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**Account Lookup Instructions**: Use any, or a combination, of the search criteria on slide 9 and 10 to identify the KFS account number

A. If the **Chart Code** needs to be changed, select 🎷 to view the **Chart Lookup** screen.

B. Enter a portion of the name in the **Account Name** field. For example, *proc* for Procurement.

C. **Organization Code** is a 4 digit code assigned to each department/organization in KFS.

D. **UC Account and UC Fund number**—The new KFS account number can be identified by entering the old legacy number.

E. **Fiscal Officer Principal Name**—Enter the UCINetID of the Fiscal Officer responsible for the KFS account.

F. Select **search**.

G. Select **return value**.
The Fiscal Officer is responsible for editing/updating this tab.

A. PALCard **Cycle Limit** is the total amount that can be charged from the 22\textsuperscript{nd} of one month to the 21\textsuperscript{st} of the following month—an approximate one-month period.

B. Single Transaction Limit matches the cardholder’s maximum Low Value Purchasing Authority (LVPA) of $5,000.
Step 7: Ad Hoc Recipients (optional)

Ad Hoc routes a document to additional people, which may or may not require additional approvals.
A. In the Person Requests section, enter the UCInetID of the Ad Hoc Recipient in the Person field. Use to view search fields that provide assistance in locating the correct ID.
B. Use the drop-down arrow in the Action Requested field to select an appropriate choice.
   - **Approve:** This action interrupts the regular workflow and requires the Ad Hoc Recipient (must have role 54 access) to open the document from their action list and select approve. *Use this option if the application needs to route to a Supervisor or a Control Point.*
   - **FYI:** This action does not interrupt workflow and sends a notification to the Ad Hoc Recipient (role 54 or 32 access).
   - **Acknowledge:** This action does not interrupt workflow but requires the Ad Hoc Recipient (role 54 or 32 access) to open the document from their action list and select acknowledge. The document can be processed without acknowledgement.
C. Select the button to complete the tab, or add additional names.

KFS role changes can be made by each department’s DSA via KSAMS.

Step 8: Save and Submit Application

- Routing Process: Applicant > Fiscal Officer > Account Reviewer (optional) > PALCard Administration.

Please direct all PALCard/PCAP questions to PALCard@uci.edu or 949.824.4040, opt. 2.