

One Card Application – Quick Guide

One Card Application

1. Galaxy Portal, through Gemini.
2. Under "Forms" click "One Card and Travel"
3. Select "One Card Application Form."
4. Complete all sections of the form and submit to your Direct Supervisor/Manager for approval (workflow will be shown at the bottom of the form after submission)
5. For definitions or further instructions please click the "Instructions" tab inside the application (as shown below)
6. Be sure to clearly indicate if the form is a "New Card" or "Update Information" (as shown below) Please note you should only submit an "Update Information" form if you are making permanent changes i.e. (supervisor changes, department change or permanent limit/card specification changes to your One Card). You must also be an existing One Card Cardholder.
7. Temporary change request (i.e. changing limit/card specifications for one time charge) should be submitted to OneCard@utdallas.edu

One Card Application Form

Instructions

Attachments

One Card Application / Action

All Fields Required

Form ID: NEXT Date: Status: Blank

Action Requested

☒ New Card
☐ Update Information

Empl ID: This will Auto-Fill

*UTD Net ID: This will Auto-Fill

Name on Card (As on official ID): Callie Speaks

*Campus Phone:

*Direct Supervisor/Manager:

*Default Cost Center:

*Division Descr:

*Last 4 Digits of SSN:

*Card Specifications: Both

*Mail Stop: (Please ensure the provided mail stop is correct)

Single Transaction Limit

☒ \$ 5,000
☐ Other

Monthly Cycle Limit

☒ \$ 5,000
☐ Other

One Card Application – Quick Guide

Travel & One Card
onecard@utdallas.edu

Additional Information:

- Will the card be used mainly for: (check one or both)

☐ Travel

☐ Purchasing

☐ Both

If you chose travel, how many travel/trips within one year?

- What is the average amount you are expecting to spend on the One Card each month?

Amount

- By checking this box, you are indicating that you are responsible for knowing your departmental requirements for submitting expense reports for approval and storing your itemized receipts electronically in Box.com

☐ Agree

Citibank Portal:

All One Cards must have the following role established in the Citibank portal.; Please discuss this with your Supervisor and Fiscal Officer.

Each cardholder must have a reconciler to update account numbers, cost centers, and add an explanation of charges in Citibank. This role can be the cardholder or delegate. If it is the delegate, it is called a reconciler.

*Citibank Reconciler:

Each cardholder must have an approver that can approve transactions in Citibank or sign off on your expense report. This position should be your supervisor or someone higher in your department. If different from your Direct Supervisor, please provide below.

Approver:

As card holder:

I agree to comply with the terms and conditions of this Agreement and the [One Card Program Guide](#).

I acknowledge that I have read and understand the terms and conditions of this Agreement and the One Card Program Guide. I also acknowledge that I must complete the One Card training and agree to follow the procedures outlined in the One Card Program Guide. I agree to use this card for [UT Dallas approved purchases only](#) and agree not to charge personal purchases. I will report disallowed/personal charges to OneCard@utdallas.edu immediately. I understand that improper use of this card may result in disciplinary action, up to and including termination of employment.

☐ Agreement

Save

Save and Submit

Delete