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
**Travel & One Card**

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?
  
  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 I 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 actions, up to and including termination of employment.

- [ ] Agreement

**Buttons:**

- Save
- Save and Submit
- Delete