Getting Started- Applying/Activating a One Card

- Fill out the application on Galaxy Main Menu, Staff Tools, Gemini Financials Self Svc, Forms, and One Card Form. A guide to the application is here: https://www.utdallas.edu/procurement/docs/OneCardP SApplicationGuide.pdf
- You will receive a pre-training questionnaire to find out if you qualify for a One Card
- If you qualify, you will receive a One Card Training email with instructions and items to complete within 30 days of receiving the email
- Once application is approved, card is ordered. Cards typically arrive in 3-4 weeks
- When the card arrives, it is mailed directly to your departmental address. The One Card team also sends an email informing you and requesting you to notify them when you receive your card to ensure limits are added
- When you receive your card, follow the instructions labeled on the card. To activate your card, you will be prompted to enter the last four digits of your social security number and set up a four-digit pin. Take note if you are approved for travel, supplies and/or both

Required Training

- Once your initial card training is completed, you will be required to take an Annual One Card Compliance Training by the end of February of each year

Disputing a Transaction

- Please contact the vendor first to dispute transactions. If an agreement cannot be reached, call Citibank using the number on the back of your card or 1-800-248-4553

Lost or Stolen Cards

- If your card is lost or stolen, notify Citibank immediately at 1-800-248-4553. Citibank will immediately suspend your One Card and issue a new card

One Card Reporting Cycle

- Typically begins on the 4th of the month and ends on the 3rd of the following month. For example: July 2019 is June 4 – July 3
- The One Card reporting cycle uses POSTING DATE, not transaction date
- Transactions usually take 2-3 days to post
- Citibank can be updated (account, cost center and business purpose) until the 10th of each month

One Card Roles

- Cardholder – Charge and gather receipts. Electronically sign Expense Report when complete
- Reconciler – login to Citibank, add/adjust cost centers, account numbers, business purpose of charges, and compare receipts with charges. *(This can be the cardholder)*
- Approver – Review transactions and electronically sign Expense Report when completed by the cardholder/reconciler
- An individual is to be appointed (Cardholder/Reconciler) to update the account code, cost center and add a detailed business purpose for each transaction before the 10th of each month
- Each transaction should be reviewed by the cardholder and/or their designee in Citibank and compared to the itemized receipt

Receipts

- Receipts – itemized receipts or invoices are required
- Receipts should be saved in BOX.COM with the electronically signed Expense Report by reporting cycle
- Please check the One Card Box.com for detailed instructions

Missing Receipts

- When a receipt is missing or not itemized, contact the vendor to get a duplicate itemized receipt
- If vendor cannot provide a copy of the receipt, email onecard@utdallas.edu to request a copy of the missing/non-itemized receipt form. The form cannot be used for airfare, hotels, or Uber/Lyft
- Excessive use of the missing receipt form may be subject to One Card suspension and/or termination

Card Suspensions or Terminations

- Based on the severity and the frequency of the following events, a One Card may be subject to suspension and/or termination
- Personal charges not reported or reimbursed to University
- Not submitting information/documents within requested timelines
- Not maintaining monthly itemized receipts and documents
- Splitting transactions to avoid One Card limits
- Purchase of restricted items
- Physically giving your One Card to others for their use
- Not completing yearly compliance training
- Dormant One Cards – after 12 months of inactivity
- Forged or altered report

Common Issues and Resolutions

<table>
<thead>
<tr>
<th>Common Issues</th>
<th>Recommended Action</th>
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</thead>
<tbody>
<tr>
<td>If you lose your card</td>
<td>Call Citibank at 1-800-248-4553</td>
</tr>
<tr>
<td>To dispute a transaction</td>
<td>Work with the vendor then if necessary call Citibank at 1-800-248-4553</td>
</tr>
<tr>
<td>If you forget your PIN</td>
<td>Call Citibank to expedite the reset at 1-877-905-1855</td>
</tr>
<tr>
<td>If you are traveling and your card is rejected</td>
<td>Call the number on the back of the card to find out why. If your card was not approved for travel, you may have to use a personal card</td>
</tr>
<tr>
<td>If you change departments and the new department wants you to keep your One Card</td>
<td>Notify <a href="mailto:onecard@utdallas.edu">onecard@utdallas.edu</a> and submit an updated application.</td>
</tr>
<tr>
<td>When you leave a position and no longer need a One Card or leave the University</td>
<td>Notify <a href="mailto:onecard@utdallas.edu">onecard@utdallas.edu</a>. Check Citibank and ensure that you have all your receipts. Provide your receipts for all transactions to your reconciler. Shred your One Card.</td>
</tr>
<tr>
<td>If you have a Name Change</td>
<td>Submit an updated application. In the Special Request box include the following: “ First or Last Name change from XXXX to YYYY”</td>
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For further assistance, email onecard@utdallas.edu

November 13, 2019