Request Funding on a PaySource Card

This can be used for either requesting a new card or for a load on an existing card.

Link: https://sp.samford.edu/dept/accounting/SitePages/Home.aspx

STEP 1: Click "Request a new PaySource Card"
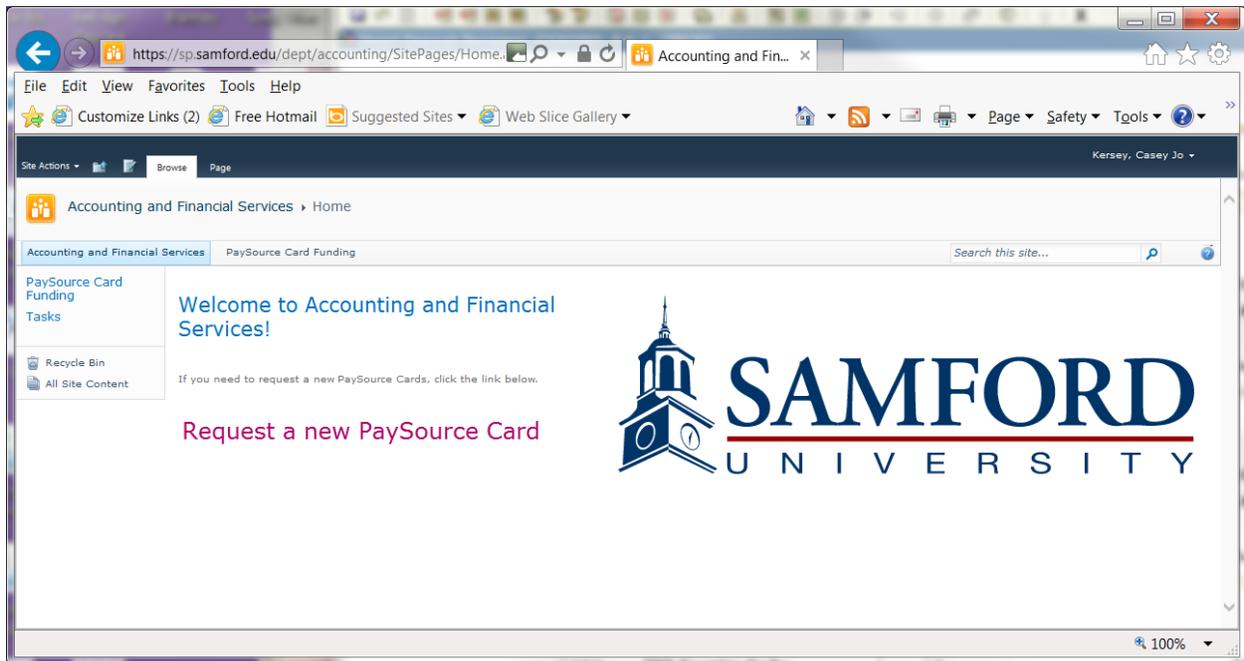
NOTE: You MUST complete each required field (denoted by a red star or bracket) BEFORE hitting submit or you will have to start the submission process over again (i.e., the submit button will "disappear"). Please make sure all fields are completed with at least one approver BEFORE hitting the submit button. The majority of user submission problems stem from missing fields.

STEP 2: Complete the Request Form Note that you will need to use the address book icon to search for a person by last name.

Request for PaySource Card Funding

ALL FIELDS MARKED RED ARE MANDATORY

Requestor Name		*
Requestor Contact Phone		*
Cardholder Name		*
Cardholder SUid (Nine Number)		*
Does the cardholder have an existing PaySource card?	○ YES ○ NO	
Is this for team travel?	○ YES ○ NO	
Will this card be used for international travel?	○ YES ○ NO	
Relationship to Samford	○ EMPLOYEE ○ STUDENT ○ OTHER	
Trip / Purpose / Description		*
Date(s)	* TO	
Date Card Needed [1]	*	
Amount Requested		*
Index Code [2]		*

1. This date should be at approximately 3 days prior to trip date to ensure adequate processing time.
2. The index code will be charged for employees after the completion of the trip, report submission, and return of funds to Samford. The index code for students and others will be charged immediately.

Approval Chain	Please enter the names of up to three of your immediate departmental supervisors who normally approve your expenditures. After your department / division approves the expenditure, it will be forwarded to accounting for issuance automatically. IT IS NOT NECESSARY TO FILL IN ALL THREE BOXES; IF YOU ONLY HAVE ONE APPROVER, ONLY FILL IN THE TOP BOX.
Departmental Approver 1	
Departmental Approver 2	
Departmental Approver 3	

STEP 3: After completing form, including appropriate approvers, click "Submit Request For Funding"

This will route the form to the approvers listed (in the order listed, one approver at a time). The requestor will also receive an email indicating the request has been forwarded to the approval process.

From:	Accounting and Financial Services <sharepointadmin@samford.edu>
To:	Kersey, Casey Jo
Cc:	
Subject:	Approver1ApprovalProcess started on Brandon Rawls- 2015-05-20T11_57_36.

Approver1ApprovalProcess has started on Brandon Rawls- 2015-05-20T11_57_36.

Participants are Kersey, Casey Jo
Due by None

Each person will receive a task to approve Brandon Rawls- 2015-05-20T11_57_36. The tasks will be assigned one at a time for participants shown above.

See "How to Approve a PaySource Funding Request" for approval instructions.