One Card Process Flow

Prep for Departmental Meetings
- Schedule Department Meetings
- Create Spend Analysis Reports by Dept/Cardholder
- Revise Procedures/Policies
- Create instructions for One Card Application/ Agreement

Supply Chain | Controller

Facilitate Departmental Meetings

Supply Chain

Post Departmental Meeting Tasks
- Based on provided Spend Analysis, work with departments to determine cardholders, card categories (Purchasing Only, Travel Only, Purchasing + Travel), spend limits, funding default
- Notify cardholder of their card categories, i.e. no change, specific changes, discontinuance
- Submit list of discontinued cardholders to UM Supply Chain
- Provide cardholder instructions on completing new One Card Application/Agreement by determined deadline
- Identify employees that will need access to PaymentNet (Read Only or Read/Edit)

FIN Structure (CSD Level)

A

B

Cardholder Tasks
- Complete One Card Application/Agreement
- Print and then sign the application/agreement
- Submit for approval to designated Approving Official

One Card Cardholder

Departmental Approving Official Tasks
- On the One Card Application/Agreement, identify the card categories, spend limits and funding default
- Approve and forward to the FIN Structure (CSD Level) at the College School Division Level for final approval

Approving Official

Final Approval of One Card Application/Agreement
- Review and approve One Card Application/Agreement
- Submit to UM Supply Chain

FIN Structure (CSD Level)

C

D

Data Verification & Submission / Training & Access Notification
- Verify completion and approval of One Card Application/Agreement
- Submit cardholder data for system configuration to JPMorgan
- Notify cardholder of training to complete in MyLearn
- Provide cardholder system access information
- Notify Approving Officials and Others with System Edit Access of training to complete in MyLearn

Supply Chain

System Configuration & Card Published
- JPMorgan configures system
- Creates card and sends to Supply Chain

JPMorgan

Card Defaults Loaded to PaymentNet & Card Received Confirmation
- Supply Chain receives One Card for cardholder 7-10 business days after system configured with cardholder data
- Supply Chain loads cardholder defaults into PaymentNet

Supply Chain

End

Cardholder Training
- Cardholder completes training for assigned card option
  - Purchasing with Travel
  - Travel Only
- Cardholders moving from P-Card to Purchasing Only card option will not need training
- 80% Pass Score required

One Card Cardholder

Card sent to Cardholder
- Training score reviewed/ approved
- Mail One Card to cardholder with receipt form
- If Travel card has balance, new card held until paid in full

Supply Chain

Cardholder Confirms Receipt of Card
- Sign receipt form
- Scan and send email to UM Supply Chain One Card (OneCard@umsystem.edu)

One Card Cardholder

Old Cards Cancelled
- Cancels old card one week after receiving confirmation receipt that new One Card has been received by cardholder

Supply Chain

End

Approving Official Training
- Policy Training
- PaymentNet Training (if not already taken)

Approving Official | Others – System Edit Access

Training Confirmation
- Verify training has been completed
- Verify pass score

Supply Chain

End