

# Corporate Card Exception Request Form

Use this guide to complete the Corporate Card Exception Form to request a PCard/Travel Card override when you have a transaction that has not been approved.

PCard email: [pcard.ap@miami.edu](mailto:pcard.ap@miami.edu)

Travel Card email: [travelcard.ap@miami.edu](mailto:travelcard.ap@miami.edu)

**Corporate Card Exception Request Form**- Use this form to request a PCard/Travel Card override when you have a transaction that needs prior approval.

When you submit this form, your name and email will be visible to the owner.

1. Go to uService portal	<a href="https://umiami.service-now.com/self-service/">https://umiami.service-now.com/self-service/</a>
2. Click on Order Items & Services	<b>Order Items &amp; Services</b>
3. Under the heading <i>Can We Help You?</i> Locate and click <b>Corporate Cards Exception Request</b>	<p>Can We Help You?</p> <ul style="list-style-type: none"> <li>&gt; Business and Finance Communications</li> <li>&gt; <b>Corporate Cards Exception Request</b></li> <li>&gt; New Supplier Request</li> <li>&gt; Password Change or Reset</li> <li>&gt; UMIT Portfolio Management Demand</li> </ul>
4. Type in the name of cardholder	<p>* Cardholder Name</p> <input type="text" value="Kimberly Jiminson"/>
5. <b>Department</b>	<p>* Department</p> <input type="text"/>
6. Select <b>Card Type</b>	<p>* Card Type</p> <p><input type="radio"/> PCard</p> <p><input type="radio"/> TCard</p>
7. <b>Merchant Name</b>	<p>* Merchant Name</p> <input type="text"/>
8. Choose <b>Request Type</b> a. <b>Approval Transaction</b> - charge declined b. <b>Dollar Request</b> - increase in credit availability	<p>* Request Type?</p> <input type="text" value="-- None --"/> <ul style="list-style-type: none"> <li>-- None --</li> <li>Approval Transaction</li> <li>Dollar Request</li> </ul>

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<p><b>9. Commodity Type</b> Note: depending on the card type chosen the commodity list will change. See step 6.</p>	<p><b><u>PCard Commodity List</u></b></p> <p>* Commodity Type ▼ More information</p> <p>Please check <a href="#">Payment Matrix</a></p> <p>-- None --</p> <p>-- None --</p> <ul style="list-style-type: none"> <li>Abstract fees/Journal fees</li> <li>Government Agency fees</li> <li>License-Professional</li> <li>Membership-Professional org</li> <li>Permits</li> <li>Postage Stamps</li> <li>Promotional Items</li> <li>Registration-Conference, Seminar</li> <li>Subscription-Magazine, Book</li> <li>Sunpass Charges-UM Vehicle</li> <li>Advertisement jobs/Classes online postings</li> <li>Car Rental</li> <li>Cell phone recurring charges</li> <li>Charitable contributions</li> <li>Dues-Professional, Civic, Community</li> <li>Equipment-Minor/non-medical</li> <li>Fines/Penalties</li> <li>Goods</li> <li>Other</li> </ul>	<p><b><u>Travel Card Commodity List</u></b></p> <p>* Commodity Type ▼ More information</p> <p>Please check <a href="#">Payment Matrix</a></p> <p>-- None --</p> <p>-- None --</p> <ul style="list-style-type: none"> <li>Abstract fees/Journal fees</li> <li>Rental-Room for a University Event</li> <li>Car Rental</li> <li>Dues-Professional, Civic, Community</li> <li>Entertainment-Meals</li> <li>Entertainment-Other</li> <li>Gift cards-Grant participants</li> <li>License-Professional</li> <li>Membership-Professional org</li> <li>Registration-Conference, Seminar</li> <li>Other</li> </ul>
<p><b>10. Date of Transaction-</b> declined</p>	<p>* Date of Transaction</p> <p>mm-dd-yyyy </p>	
<p><b>11. Transaction Declined</b></p>	<p>* Was your Transaction Declined?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	
<p><b>12. Business Purpose –</b> Should answer Who, What, When, Where and Why.</p>	<p>* Business Purpose (Please add detailed amount of increase or override request)</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
<p><b>13. Date Required By-</b></p>	<p>Date Required By</p> <p>▼ More information</p> <p>Please select a date that is on or after today.</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <p style="text-align: right;"></p>	
<p><b>14. Urgency-</b> Choose level of importance</p>	<p>Urgency</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>3 - Medium <span style="float: right;">▼</span></p> <p style="background-color: #007bff; color: white; padding: 2px;">1 - Critical</p> <p>2 - High</p> <p>3 - Medium</p> <p>4 - Low</p> </div>	
<p><b>15. Attachments-</b> To add an attachment please click on the paperclip icon in the upper right corner or</p>	<div style="border: 1px solid #ccc; width: 100px; height: 40px; display: flex; align-items: center; justify-content: center;"> </div>	

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drag and drop documents.  <b>Note-</b> please add any relevant documents that support	
16. <b>Submit Order</b>	<div data-bbox="695 478 1084 604" style="border: 1px solid #ccc; padding: 5px; text-align: center;">Order this Item  <input data-bbox="708 541 1071 596" type="button" value="Submit Order"/></div>

## Resources-

1. [Payment Matrix](#)
2. [Supplier Information \(UMarkteplace\)](#)
3. [Onboarding a Supplier to Workday](#)
4. [PCard Authorized Purchases](#)
5. [Travel Card Authorized Purchases](#)
6. [Corporate Cards Website](#)