Adobe Sign: P-Card/T-Card Authorization and Application Information Forms

UPAY Card Services has posted the P-Card / T-Card Authorization and Applications Information form along with the P-Card / T-Card Exception Request forms in Adobe Sign as a workflow.

All users will need an Adobe Sign profile. Users will need to be granted permission to send forms in Adobe Sign by contacting their department's USC for your Adobe Sign permissions.

Information about Adobe Sign: https://answers.uillinois.edu/systemoffices/page.php?id=99719

P-Card/T-Card Authorization and Application Information form procedure:

- The Department Card Manager (DCM) selects the link for the application.
- To log into Adobe Sign, the DCM should enter the following information:
    - DCM's Illinois.edu email
    - NetID
    - Password
- The following information should be entered on the first page of the Workflow:
    - Applicant's email
    - Department Head's email
    - Select "Send"
- Steps to be taken on the "Application" page
    - Select the yellow Start tab
    - Complete the required fields
    - Select the "Send" button at the bottom of the form

Once the user hits send:

1. The application will be sent to the Cardholder to be completed.

2. Once the applicant has filled out their required fields and selected the Send button, the form will be sent to the Department Head for completion.

3. Once the DCM selects send, the DCM and Card Services will receive a copy of the signed form. (The DCM will not need to send an email of the completed application to Card Services.)

P-Card Application

https://uofi-1.na1.documents.adobe.com/account/customComposeJs?workflowid=CBJCHBCAABAAi-O5fToEIqzOCkFSlcMME4NwOg_AxI6x

T-Card Application

https://uofi-1.na1.documents.adobe.com/account/customComposeJs?workflowid=CBJCHBCAABAAD5Ip1isH5J_JrBhHTZM1Z_3AtDT420ho

P-Card/T-Card Exception Request form procedure:

- The Sender (usually the Cardholder or DCM) selects the link for exception
- To log into Adobe Sign, the User should enter the following information:
    - User's **Illinois.edu** email
    - NetID
    - Password
- The following information should be entered on the first page of the Workflow:
    - Applicant's email
    - Department Head's email
    - Select Send
- Steps to be taken on the "Exception Request" page
    - Complete the form
        - Date
        - Org Code
        - Department Name
        - Department Contact
        - Campus Address
        - Phone Number (best number for questions)
        - Department Contact's Email
        - Description
            - Who?
            - What?
            - Where?
            - When?
            - Why?
            - How much (Cost)?
            - University business purpose.
            - Any pertinent URLs
        - Printed name, Signature, UIN, and date
            - Cardholder
            - DCM
            - Department Head
    - Select send to forward the form to the Cardholder.

Once the Cardholder signs the form and selects Send:

- The form will be sent to the DCM and then the Department Head.
- Once complete, the Sender will receive a copy of the Signed exception request.
- The Sender will need to submit the completed application, along with supporting documents, to Card Services at cco@uillinois.edu.
- A box has been added to the form to allow additional documents to be attached to the request form by anyone.

P-Card Exception Request: https://uofi-1.na1.documents.adobe.com/account/customComposeJs?workflowid=CBJCHBCAABAAn8odjiqc3mqZizGDd7JrdIVH-6y6Snhd

T-Card Exception Request:

https://uofi-1.na1.documents.adobe.com/account/customComposeJs?&workflowid=CBJCHBCAABAAbg-RCibT7-ypov9ClTKRNNFMKF9oB00t