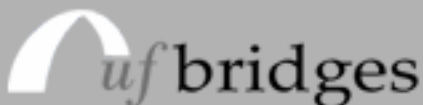


[Dispute Transactions]

This instruction guide is designed to assist those who reconcile and approve PCard transactions and have a need to dispute a transaction. The roles required to perform this task are UF_PO_PCARD_**RECONCILER** and UF_PO_PCARD_**APPROVER**.

- ▶ Log into the system via the myUFL portal, using your GatorLink User ID and password (<http://my.ufl.edu>).
- ▶ Navigate to Purchasing > Procurement Cards > Reconcile Cardholder Info > Reconcile Statement
- ▶ Enter the cardholder's EmplID.
- ▶ Press the **Search** button.
- ▶ Select the cardholder from the search results.
- ▶ Select the transaction.
- ▶ Click on the **Details** tab.
- ▶ Enter the amount to be disputed in the **Dispute Amount** field.
- ▶ Click on the **Comments** link.
- ▶ Enter text describing the reasons for the dispute or any other comments about the selected transaction.
 - ▶ If a formal dispute is filed, please enter "Formal Dispute filed mm/dd/yyyy" in the description field, where mm/dd/yyyy is the date the dispute was filed. Send copy to the PCard team by fax (352-392-0081) or mail (Elmore Hall, Box 115350 ATTN: Formal Disputes).
- ▶ Press the **OK** button when done.
- ▶ Do NOT change the status. Leave the status at **Staged** and click the **Save** button to update transaction information in the database.
 - ▶ The transaction status applies to the entire transaction amount. If you dispute a portion of a transaction, you cannot approve a portion of a transaction. Simply leave the status as **Staged**. Once the dispute is resolved, you can change the status to **Approved**.
 - ▶ If you have filed a formal dispute, you can change the status to **Approved**. The bank will respond once the dispute has been resolved - either the bank will issue a credit which will appear in the system and be placed against the ChartField that paid the initial transaction, or the transaction that has already been approved was valid.
- ▶ Verify your entry and press the **Save** button.



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