

IFAS Shared Service Centers (SSC) PCard Instruction Guide

To standardize processes for all departments, please email all documents (scanned or electronic copies) to the appropriate Shared Service Center ([McCarty](#) or [Fifield](#)). Each email should have a subject line containing [PCARD](#). (Example: **Subject: PCard for Smith Office Depot \$123.45**)

Step 1: Cardholder makes a purchase with his/her UF PCard

- **WHEN ITEM(S) HAS/HAVE BEEN RECEIVED**, follow normal PCard review and internal approval procedures per unit and [Purchasing Directives and Procedures](#).
- Unit's cardholders and authorized senders are still responsible for following current PCard regulations as specified in the [PCard Training Courses](#), [PCard Index](#), and the [University Directives and Procedures](#).

Step 2: Cardholder or Unit prepares receipts to be sent to the SSC

For Paper Receipts:

- Scan receipt and any appropriate documentation, forms, or justifications as **.pdf** files.
- Prepare an email to be sent to the appropriate IFAS SSC ([McCarty](#) or [Fifield](#)); remember to use the subject line as indicated above. Please include the required information as described below or use the [PCard email template](#).
- Be sure image(s) is/are legible and attach to email.

For Electronic Receipts Received via Email:

- Forward the email from the vendor which contains the PCard purchase receipt or invoice to the SSC ([McCarty](#) or [Fifield](#)).
- Remember to use the subject line as indicated above and to include the required information as described below or use the [PCard email template](#).
- Scan any additional forms or justifications as legible .pdf files and attach to the email.

Required In the Body of Email OR Handwritten on the receipt:

- Name of cardholder.
- Project or fund to be used for payment and, if applicable, faculty name.
- Unless clearly listed on receipts, include description or list of items purchased.
- If purchase is for fuel, provide UF vehicle number or rental agreement number. UF vehicle number is also needed for maintenance, repairs, or other items purchased for a vehicle.
- If purchase is a registration fee or travel related that requires a TA, please include the TA#.
- Justification, use or benefit for the purchase.
- Be sure to include evidence of:
 - Internal approval: This can be an email approval from the faculty member or supervisor or handwritten signature on the receipt.
 - Acknowledgment of charge by PCard holder: This can be an email acknowledgement or handwritten signature on the receipt.

Step 3: SSC receives and processes PCard transaction

- SSC reviews and analyzes the PCard request.
- SSC reconciles and approves PCard transaction.
- SSC uploads the PCard documentation in PeopleSoft.

Best Practices/Helpful Links

- Send PCard receipts/invoices to the SSC as soon as you receive the items. Notify the SSC if items are not received or missing, order is incorrect, damaged, returned, etc.
- The SSC will assist by providing courtesy reminder emails of staged charges that need information and documentation.
- [myuf Market PCard Help](#) - Contact the *myuf* Market help desk for assistance with attaching your PCard to *myuf* Market as your default payment method.
- [UF Purchasing](#)
- [UF Purchasing Helpful Resources](#)

For assistance with this process or anything else, please contact your Shared Service Center:

McCarty

Phone: 352-294-3199

Email: mccarty-ssc@ufl.edu

Fifield

Phone: 352-273-4583

Email: fifield-ssc@ufl.edu