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