UNIVERSITY OF
South Carolina

Office of the Controller
P-Card Purchasing Shared Service Requester Job Aid

This resource outlines the process for completing a purchase with the P-Card Purchasing Shared Service in the Controller's Office, including required documentation, timelines, and how the team will complete the purchase during a Teams call.

Step 1: Before requesting a purchase, complete the form to include the chartfield and proper approval signatures.

Note: Department approval must follow the workflow approver for the department listed on the request form, consistent with Requisitions, Payment Requests, and Expense Reports. Use the **SC_SECURITY_DEPT_APPROVERS** query to identify Level 1 and Level 2 approvers.

If using USCSP funds, only the Principal Investigator (PI) signature is required at Level 1. The Purchasing P-Card Shared Service team will send periodic summary emails to Level 2 approvers outlining purchases made. Approvers will be asked to respond to confirm their approval, and that email confirmation will be saved and attached to the corresponding expense report.

The Department Approval Query Quick Reference provides step-by-step instructions for using the above query in Finance PeopleSoft.

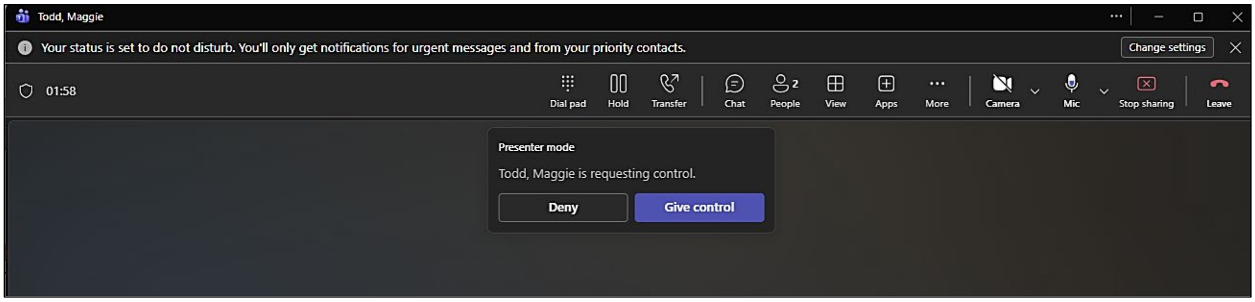
Step 2: Email the service team at pcardpurch@sc.edu to request a purchase.

Step 3: The service team will respond to the request within 2 hours during business hours, 8-5pm. For same day purchases, request must be made by 3pm.

- **Online purchases:** Please have the website open, items selected, in the cart, and ready to share your screen prior to joining the scheduled call so the purchase can be completed efficiently.
    - **Amazon:** A justification memo is required for this request, as most items are expected to be purchased from small or local businesses. Please include the memo as an attachment to the email.
    - **Staples:** Build your cart using your Staples Business account, print cart as a PDF, and attach it to the email with the request form.

- **Phone call purchases:** Have the vendor's phone number available prior to joining the scheduled call. A service team member will contact the vendor and complete the payment while the requester is present on the call.

Step 4: The service team will take control of the screen when it's time to make the payment. Click the **Give Control** button to allow access for control.



Step 5: The service team will make the purchase. The form with approvals and a screenshot of the proof of payment will be attached to the Teams meeting before ending the call.