



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

This resource outlines the process for completing a purchase with the P-Card Shared Service Team 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\_APPROVER\_ROLE** 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 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.

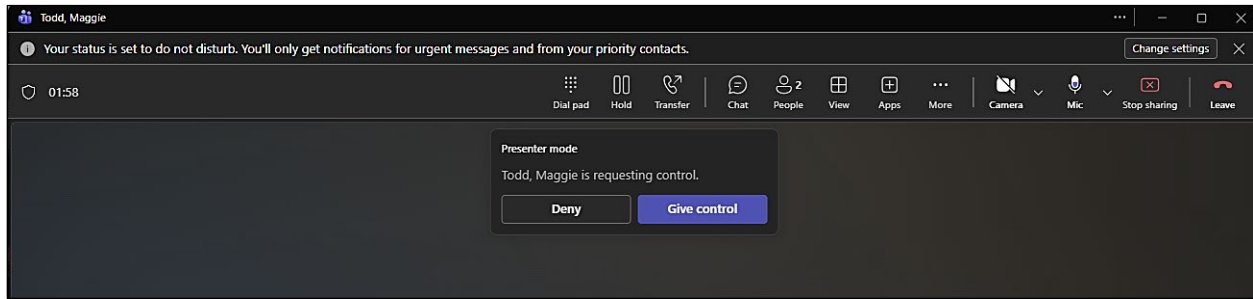
The [Department Approval Query Quick Reference](#) provides step-by-step instructions for using the above query in Finance PeopleSoft.

**Step 2:** Email the service team at [pcardpurch@sc.edu](mailto:pcardpurch@sc.edu) to request a purchase.

**Step 3:** The service team will respond to the request within 24 hours during business hours.

- **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:** Employees without a P-Card will now place all office Staples supply orders through [Staples Business Advantage](#) using a e-registration process. Users must still submit a request form via email to Shared Services. Once registered, users will create and submit their orders directly through their new Staples Business Advantage account. To register for a USER ID to access Staples Business, use this [link](#).
- **Phone call purchases:** Have the merchant'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.