

P-Card Holder Ordering Procedures School of Social Work

Background

P-Cards (Purchasing Cards) are campus-issued credit cards to be used for the purchase of allowable office supplies, food and beverage supplies, software, and conference registration. They are not widely distributed by the School of Social Work due to the required logging and processing required. Cards are held by SSW Expense Team members in the Business Office as well as key staff in other SSW offices.

Process for P-Card Holders to make a purchase

- You MUST be familiar with the **Prohibited and Restricted Purchase lists** (<https://www.obfs.uillinois.edu/cms/One.aspx?portalId=77176&pageId=92162#restricted-purchases>)
 - Items may be restricted by the fund type that may be used; complete the **P-Card Exception Request Form** (<https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=94685>)
 - For software and electronic services, see the School of Social Work Equipment and Software Purchase and Use Policy.
 - For **software**, confirm with sw-computer@uillinois.edu that the P-Card is the appropriate means of purchase, then complete the Software Purchased by P-Card Form (<https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=9474>)
 - For **electronic services**, complete the Electronic Services by P-Card Form (<https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=9456>)
- You MUST **request Tax Exemption**. The tax exempt identification number is your card. You will also need a copy of the Tax Exemption Letter (<https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=93238>)
- After the purchase has been made:
 - Print a **final receipt** showing the total charged and either a zero balance or PAID and the last four digits of the credit card number.
 - Create an **Order Log** (instructions at <https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=96596>)
 - The “Description” prints on reports, so make it useful, ie.
 - Jones NASW registration
 - book for coursework
 - supplies for student event 4/30/18
 - Provide **complete “Comments”**: Who is it for? What is the charge? If on a grant, how does it relate to the project? SPELL OUT acronyms!
 - Registration for Jones to attend National Association of Social Workers conference to present results of research and meet with funding agency
 - Book “Making of a Social Worker” for Jones to be used for course development
 - Napkins, cups, and plastic utensils for lunch lecture 4/30/18 to be attended by undergraduate School of Social Work students.
 - **Print the order log**
 - **Bring or send the original receipts and order log** to the School of Social Work Business Office (Room 2058, 1010 West Nevada, Urbana, IL 61801 or MC-082) and leave them with Amy or Crystal.

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Need help?

- See the T-Card vs. P-Card Quick Reference
(<https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx?itemId=94904>)
- See the list of Prohibited and Restricted P-Card Purchases
(<https://www.obfs.uillinois.edu/cms/One.aspx?portalId=77176&pageId=92162#prohibited-purchases>)
- Contact sw-expenses@uillinois.edu