

## **P-CARD PROCESSPLAN GUIDELINES**

When submitting pre-approval request via ProcessPlan use the following guidelines depending on the type of request.

1. NOTE: One vendor/order per request
2. Enter Requestor First and Last Name, Requestor Email Address, Requestor Phone Number or VSU extension.
3. Enter Department the pre-approval request is for
4. Enter Purchase Description: This should define a high level description of what is being intended to be with
  1. For student meals when traveling: this is the only field that can be notated as TBD
7. Enter Purchase Amount: This should include the cost of the goods/services and match the attached document.
  1. In those rare instances where the cost is TBD, enter an estimated amount or "not to exceed" amount.
  2. Entering your STL limit does not constitute an estimated amount
8. Enter Budget Approver Name and Budget Approver Email Address.
9. Enter P-Card Holder Name and P-Card Holder Email address
  1. NOTE: this email must be the budget approver's email address and not the cardholder/requestor email
10. Enter Budget Chartfield: MUST include Dept-fund-program-class-account
11. Select if the purchase is IT Related:
  1. IT Related purchases include software, online database access/license, VoIP/Computer hardware, and anything that touches the VSU Network.
12. ATTACHMENTS:
  1. Quote or PDF copy of shopping cart:
    1. Must be from vendor or from the vendor's website, and include a description of goods or services, quantity, and total cost
  2. For student trips: a copy of the roster/list of students traveling, and quote/pricing of anticipated lodging.