

## **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 purchased.
  1. Ex: Registration for NSPAA Conference
5. Enter Justification: This should be the who, when, where, why of the purchase.
  1. Ex: Catherine Storey NSPAA Registration for Feb 2019 Conference to maintain certification for job.
6. Enter Vendor Name: Who the purchase is 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.
    1. For student meals when traveling: a copy of the roster/list of students traveling since meal location/pricing will be estimated
  3. For student events/meals on Campus: For registrations: any registration documents (PDF copy of website also acceptable) that includes a description of event/conference and cost.
    1. Flyer of event or PDF copy of email to students regarding the event/meal
    2. Quote or PDF of shopping cart to show how purchase amount (even if estimated) was arrived at
  4. For employer-provided clothing (excluding Law-Enforcement & Facilities):
    1. Quote and completed [Employer-Provided Clothing Form](#)

In the event of a state-defined emergency a post-approval email is allowable and should be sent to [pcard@valdosta.edu](mailto:pcard@valdosta.edu) within 72 hours of the unplanned purchase (VSU PCard Policy III.b.2.).

Per the Georgia Procurement Manual 1.3.5. an emergency purchase is defined as the immediate welfare of the general public; poor planning or the pending expiration of funds does not constitute a valid justification for an emergency purchase.