

# P-Card Forms Instructions

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## New P-Card Request

### Introduction

This section will guide you through how to fill out the New P-Card Form to request a new P-Card for yourself or for one of your employees. All new P-Card requests must be approved by the cardholder’s supervisor and their institution’s controller before they can be issued. An overview on the purpose and proper usage of your P-Card can be found in our P-Card Program Manual located on our Business/Financial Policies pages on the VSC website.

## Page 1: AP – Requestor Info

The form assumes that the person requesting a new P-Card will be the cardholder and will pre-fill the Requestor fields accordingly. If you are the cardholder, confirm that the pre-filled information is accurate. If you are making a request on behalf of someone else be sure to **change ALL the Requestor fields to the cardholder's information:**

AP - Requester info

Requester Name: *Required*

---

ColleagueID#: *Required*

---

UserID: *Required*

---

Email address: *Required*

---

Phone Number *Required*

Please use phone number with area code or a 5 digit extension (ex 802-224-3010 or x43010). Please use the best number to reach you.

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Department: *Required*

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VSC Organization: *Required*

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Supervisor/Director/Department Chair *Required*

**NEXT**

The Dean and Chancellor/President fields will automatically populate. **Do not change the Dean or Chancellor/President unless you have been directed to do so.**

## Page 2: Request Type

Confirm your request type. If you selected "Request a New P-Card", continue with the instructions below. If you selected "P-Card limit increase request", skip to the next section "Page 3: P-Card Limit Increase".

### VSC PCard Requests

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#### Request type

Please select the type of request:

- Request a new PCard
- PCard limit increase request

---

PREVIOUS

NEXT

## Page 3: Request a New P-Card

Confirm your P-Card information. The form will pre-fill the standard P-Card limit of \$3000/month and \$1500/transaction. Do not change this limit unless you have been directed to do so.

### VSC PCard Requests

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#### New PCard request

Amount per transaction limit *Required*

\$1500

Amount per month limit *Required*

\$3000

In the “Card Holder Name / Business Purpose” section reiterate the cardholder’s name and enter a **brief** explanation of why they need the P-Card, what purchases are expected, etc.

Card Holder Name / Business Purpose

In the “Default GL code” field, enter the GL code that the cardholder will use to allocate their P-Card expenses:

Default GL code *Required*

e.g. 060-60000-60000-60000-000

If the cardholder will need access to any additional GL codes, select “Yes” on the “Additional GL codes needed?” drop-down. You may enter up to nine additional GL codes:

Additional GL codes needed? *Required*

Yes▼

GL Codes

	COLUMN 1	COLUMN 2	COLUMN 3
Row 1	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>
Row 2	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>
Row 3	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>
Row 4	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>	<div style="border: 1px solid black; height: 30px;"></div>

e.g. 060-60000-60000-60000-000

## Page 4: Review your supplied details

The final form page summarizes the information you entered. Review this page for completion and accuracy. If you need to correct anything, you can click the "Previous" button to navigate through the form pages to make any necessary corrections. Any changes you make to the form will save as soon as you hit the "Next" button to navigate to the next page.

### VSC PCard Requests

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#### Review your supplied details

Pressing "Submit Form" will send these details for processing.

#### Page: AP - Requester info

**Requester Name:** Natalie Powell

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**ColleagueID#:** 1234567

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**UserID:** nxp00028

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**Email address:** nxp00028@vsc.edu

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**Phone Number** 123-456-7890

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**Department:** Finance

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**VSC Organization:** Office of the Chancellor

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**Supervisor/Director/Department Chair** Tracy Bashara

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**Divisional Dean OC** Toby Stewart

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**ControllerOC** Toby Stewart

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**Chancellor** Sharron Scott

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## Page: Request type

Please select the type of request: Request a new PCard

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## Page: New PCard request

Amount per transaction limit \$1500

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Amount per month limit \$3000

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Card Holder Name / Business Purpose Natalie Powell. Need to buy supplies for Holiday Parties.

---

Default GL code 060-60000-60000-60000-000

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Additional GL codes needed? No

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[PREVIOUS](#)

[SUBMIT FORM](#)

Once your form is successfully submitted, you will receive a confirmation email with the form summary information and a copy of the request attached. The request will be processed once the cardholder's Supervisor and their institution's Controller submit their approval.

Once the new P-Card is approved and set up, an email with further instructions will be sent to the new cardholder. All new P-Card Holders need to sign and return a P-Card Acknowledgement Form, included in their New P-Card Welcome Email, before they can receive their P-Card. **Their P-Card will not be sent until this form is completed and returned.**

# P-Card Limit Increase Request

## Introduction

This section will guide you through how to fill out the P-Card Limit Increase form to request a P-Card limit increase for yourself or for one of your employees. A limit increase should be requested when a cardholder's transaction and/or monthly spending limit is no longer sufficient for the purchases they need to make on behalf of their department. The limit increase can be temporary or permanent, depending on the cardholder's circumstances.

The limit increase limit increase amount and duration should be agreed upon between the cardholder and their supervisor before submission to ensure the request is processed quickly and accurately. Request must be approved by the supervisor and the institution's controller before the limit increase can be processed.

## Page 1: AP – Requestor Info

The form assumes that the person requesting a limit increase is the cardholder and will pre-fill the Requestor Info fields accordingly. If you are the cardholder, confirm that the pre-filled information is accurate. If you are making a request on behalf of someone else be sure to **change ALL the Requestor fields to the cardholder's information:**

AP - Requester info

Requester Name: *Required*

ColleagueID#: *Required*

UserID: *Required*

Email address: *Required*

Phone Number: *Required*

Please use phone number with area code or a 5 digit extension (ex: 802-224-3010 or x43010). Please use the best number to reach you.

Department: *Required*

VSC Organization: *Required*

Supervisor/Director/Department Chair: *Required*

**NEXT**

The Dean and Chancellor/President fields will automatically populate. **Do not change the Dean or Chancellor/President unless you have been directed to do so.**

## Page 2: Request Type

Confirm your request type.

### VSC PCard Requests

#### Request type

Please select the type of request:

- Request a new PCard
- PCard limit increase request

PREVIOUS

NEXT

## Page 3: P-Card Limit Increase Request

Enter the new P-Card limit being requested:

### VSC PCard Requests

#### Limit increase request

Amount requested per transaction

Requested monthly limit

Specify if this new limit should be temporary or permanent:

The nature of this request: *Required*

- Temporary
- Permanent

Provide a **brief** explanation of why the P-Card limit increase is necessary. If the request is temporary, provide an end date for the new limit. If the request is permanent, explain why.

Reason for this request:

## Page 4: Review your supplied details

The final form page summarizes the information you entered. Review this page for completion and accuracy. If you need to correct anything, you can click the "Previous" button to navigate through the form pages to make any necessary corrections. Any changes you make to the form will save as soon as you hit the "Next" button to navigate to the next page.

### VSC PCard Requests

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#### Review your supplied details

Pressing "Submit Form" will send these details for processing.

#### Page: AP - Requester info

**Requester Name:** Natalie Powell

---

**ColleagueID#:** 1234567

---

**UserID:** nxp00028

---

**Email address:** nxp00028@vsc.edu

---

**Phone Number** 123-456-7890

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**Department:** Finance

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**VSC Organization:** Office of the Chancellor

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**Supervisor/Director/Department Chair** Tracy Bashara

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**Divisional Dean OC** Toby Stewart

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**ControllerOC** Toby Stewart

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**Chancellor** Sharron Scott

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Page: Request type

Please select the type of request: PCard limit increase request

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Page: Limit increase request

Amount requested per transaction 3000

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Requested monthly limit 5000

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The nature of this request: Temporary

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Reason for this request: Natalie Powell. Need extra funds to buy supplies for Halloween Party.

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PREVIOUS

SUBMIT FORM

Once your form is successfully submitted, you will receive a confirmation email with the form summary information and a copy of the request attached. The limit increase will be processed once the cardholder's Supervisor and their institution's Controller submit their approval.

Once the limit increase has been processed, a confirmation email will be sent to the cardholder confirming that they are now able to use their new limit.