# P-Card Process and Workflow Manual

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Overview

I. P-Card forms available online

a. Purchasing Card (Cardholder Agreement Form)

*This form is used to collect the information required before a person can request a P-Card.

b. Purchasing Card (New Card Request)

* This form is used to request a card for a new cardholder.

c. Purchasing Card (Change Request)

* This form is used to request a change to the card that has already been issued.
II. Approval Workflow (used for New P-Card Request and P-Card Change Request)

Submit form online

Is the requestor the cardholder?

Cardholder Approves

Direct Supervisor Approves

Is the supervisor also the Financial Manager?

Financial Manager Approves

Yes

P-Card Coordinator Review

Assistant Controller Review

No

Yes

P-Card Coordinator Process Request
Form Submission Process

I. How to Submit a Purchasing Card (Cardholder Agreement Form)

a. The link to the online forms is located in the “Mywings” portal under the Staff tab in the My Applications channel and look for Employee Online Forms.

b. Under the category Finance/Purchasing Card (P-Card) you will see Purchasing Card (Cardholder Agreement Form).
c. Select “Yes” for Start and Click the Next button.

d. You will see your name and N# under employee information. Read and check all the boxes under Statement of Understanding and click Submit.

e. You will see a confirmation message letting you know it has been submitted.

✓ Your Request was submitted.
II. How to Submit a Purchasing Card (New Card Request)

a. The link to the online forms is located in the “Mywings” portal under the Staff tab in the My Applications channel and look for Employee Online Forms.

b. Under the category Finance/Purchasing Card (P-Card) you will see Purchasing Card (New Card Request).
c. Enter the **Card Holder ID (N#)** and click **Submit**.

![Card Holder ID (N#)](image)

**NOTES:**
- There will be a short pause while the form goes and gets information after some questions are answered. A warning will appear at that time.

- All employee fields (Cardholder, Direct Supervisor, Account Manager, Business Manager) all come with a search option icon (🔍). This will open up a search box where you can perform a search.
  - Type in the person’s name (Last Name, First Name).
  - Click the Search button.
  - It will display a list of names that meet your criteria.
  - Click the name of the person you want and it will populate into the field.

![Search Box](image)

d. A rush request will result in a $25.00 charge to your department’s account.

**Rush Card:** Yes

*This will result in a $25.00 charge to your department.*

e. Enter all the information.
  - Some fields are required before it can pass to the next step in the workflow.
    - Requestor
      - Direct Supervisor of the Cardholder
      - Rush Card
    - Cardholder
- Mother’s Maiden Name
- Last 4 of the SSN

- Direct Supervisor
  - Employee’s Department
  - Index
  - Account Manager
  - Business Manager
  - Card Use
  - Per Transaction Limit
  - Monthly Limit

f. Once the form has been completed, click Submit at the bottom.
g. If there are any errors that prevent you from submitting they will be displayed at the top of the form. General validation errors will be one or both of the following:

- You need to fill in all required fields.
- Some of the values you provided are not valid. Please review and fix your answers.

- Required answers will have a * next to them.
- Invalid answers will have a warning next to them.

III. How to Submit a Purchasing Card (Change Request)

a. The link to the online forms is located in the “Mywings” portal under the Staff tab in the My Applications channel and look for Employee Online Forms.
b. Under the category Finance/Purchasing Card (P-Card) you will see Purchasing Card (Change Request).

c. Enter the Card Holder ID (N#) and click the Submit button.

NOTES:
➢ There will be a short pause while the form goes and gets information after some questions are answered. A warning will appear at that time.

➢ All employee fields (Cardholder, Direct Supervisor, Account Manager, Business Manager) all come with a search option icon ( ). This will open up a search box where you can perform a search.

   ➢ Type in the person’s name (Last Name, First Name).
   ➢ Click on the Search button.
   ➢ It will display a list of names that meets your criteria.
   ➢ Click the name of the person you want and it will populate into the field.
Other fields will also have searches where you can search by Code or Description.

- Cardholder’s Department

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000</td>
<td>President’s Office (100000)</td>
</tr>
<tr>
<td>100100</td>
<td>President’s Office (100100)</td>
</tr>
<tr>
<td>100190</td>
<td>President’s Office-OPS TimeEntry (100190)</td>
</tr>
</tbody>
</table>

d. The only required field is the direct supervisor, one change request field entered and reason for change.
   - Changes can be one or all of the following:
     - Cardholder’s Name
     - Cardholder’s Department /Index
     - Cardholder's Limits
e. Click **Submit** at the bottom of the form.

f. If there are any errors that prevent you from submitting they will be displayed at the top of the form.
   - General validation errors will be one or both of the following:
     - You need to fill in all required fields.
     - Some of the values you provided are not valid. Please review and fix your answers.
   - Required answers will have a * next to them.
   - Invalid answers will have a warning next to them.
     - Example:
Approval Process

I. Where to go to see your work

a. The link to the online forms is located in the “Mywings” portal under the Staff tab in the My Applications channel and look for Online Form Approvals.

II. How to approve/deny a request

a. Under Request to Review in the “Action” column click on the Review link to open the request to review and approve.

NOTE: If you need to make changes to the requested information you need to check the Open Editor box before opening.
b. Review the request. At the bottom, select the decision you want.

c. If the next step is optional then you will be required to select who to send it to next.
   ➢ Example: Direct Supervisor is also the Financial Manager so they would skip that step and send it on to the P-Card Office
d. Enter any notes you want saved about the decision (This is optional).
   - **NOTES:**
     1. Internal notes are only shared with the person or group making the decision.
     2. Communication information is shared with everyone in the workflow.

![Select Action/Reason if requested. Then click the "Submit" Button.]

- **Internal Notes**
  - These are notes for me.

- **Communication Information**
  - This is a test.

e. Click the **Submit** button.

f. You will receive a confirmation message that your request was submitted.

**Purchasing Card (Change Request)**

- [Check] Your decision on this request was submitted.
- You can find all your request(s) and their status under UNF Administrative Applications in [Online Form Approvals](#).

### III. How to find the status/history of a request

**NOTE:** You can only see the request that you have made a decision on or you are in a group that is required to see the request.

- The link to the online forms is located in the “Mywings” portal under the **Staff tab** in the **My Applications** channel and look for **Online Form Approvals**.
b. The request that you submitted and is still in the workflow will be seen in the default view under Pending Request(s):

<table>
<thead>
<tr>
<th>Req</th>
<th>Employee ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Action Pending</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>170</td>
<td>N00005595</td>
<td>Dirk</td>
<td>Small</td>
<td>Direct Supervisor Approval</td>
<td>View</td>
</tr>
</tbody>
</table>


c. For a request you did not submit but have been approved/denied or is in a group that is required for review:
   - Request Status: Set to “Show All”
   - Form - Department to “Finance” * This is the department where the form was created for.
   - Select the form you want.
     - Only the forms that were submitted and you have access to will appear in the drop down.

Online Form Approvals

The Online Form Approval form is used to review/approve request and check the status of an online request form. For Additional Information please click HELP. For more information you can click on Documentation.

Request(s) to Review: 1

<table>
<thead>
<tr>
<th>Req</th>
<th>Employee ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Action Needed</th>
<th>Advise</th>
<th>Action</th>
<th>Proxy</th>
</tr>
</thead>
<tbody>
<tr>
<td>145</td>
<td>N00005595</td>
<td>Dirk</td>
<td>Small</td>
<td>Direct Supervisor Approval</td>
<td>Review</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


d. To view the history of who has submitted a current request click on the request number.
e. A new window will open showing you the current status and the decision history of the request.

Request Status Review

<table>
<thead>
<tr>
<th>Current Status Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request No.:</td>
</tr>
<tr>
<td>Request Type: Purchasing Card (New Card Request)</td>
</tr>
<tr>
<td>Requester: Dirk Small (N00005595)</td>
</tr>
<tr>
<td>Status: Pending Approval by Dmitry Bond as Direct Supervisor</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>Requester</td>
</tr>
</tbody>
</table>

f. Close this window to go back to the main review screen.