

# P-CARD

## TIPS & TIME SAVING STRATEGIES

### 3 EASY STEPS:

1. Upload receipts
2. Update chartfields (remove program if paid on project)
3. Complete sign-off (by 15th)

### RECEIPT SHOULD INCLUDE:

*Be sure to upload a **detailed receipts/invoice**, not just an email or order confirmation*

- Vendor Name
- Date of purchase
- Item Description
- Total Amount of Purchase

P-card cycle runs each month on the 16th- 15th (ex: May 16 -June 15) and closes on the 20th, no changes can be made to the chartfield after the 20th for the previous cycle.

**Reconcile by 15th each month!**

**UNC IS TAX EXEMPT!  
DO NOT PAY TAX WITH THE P-CARD**

### COMMON ACCOUNT CODES:

- Conference Registration (in-state) 528310
- Conference Registration (out-of-state) 528320
- Membership Dues 558310
- Research Supplies 537210
- Repairs: 524170
- Service: 558913
- Shipping (only): 527420

Sign-Off (required): Comments should include how the item furthers the research aims/ project

Choose mass chartfield allocation when allocating same chartfield to multiple charges

One Drive App: Download to manage receipts (upload or take picture), attach when transaction

Be sure to enter correct CFS for each field. Scroll to the far right of page to take out default fields, ie: Program Code & Cost Code.

Department Use (approval/procedure/chartfield):

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Contacts for Further Help

- **Access:** Request via RASR, option: P-Card Access Request
- **Technical/Navigation:** Pcard@unc.edu
- **Others:** chemadmin@unc.edu