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| Title: OB/GYN Chrome River PCard | SOP |
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SCOPE

Applies to all OB/GYN PCardholders.

PURPOSE

To outline new department procedure for using a PCard with Chrome River.

PROCEDURES

- 1) Receive request to purchase.
- 2) Email HSC-OB-Purchasing for approval and to confirm if a special exception is needed.
- 3) Place order (if a special exception is needed wait for approval before purchasing).
- 4) Record purchase on PCard Running Log (new format on Wiki)
 - a) This is a running log of purchases meaning once started, you will use the same log forever regardless of fiscal year.
 - b) Save in your PCard folder to allow a delegate to reallocate if you are out for an extended period.
 - c) There is no need to ever print this.
- 5) Save PDF receipt/support to Pending Receipts folder under specific name.
 - a) No physical printing, print to PDF or scan mailed receipt.
 - b) Save receipt PDF in below formats for filename:
 - i) Non-travel: Type-Vendor-Requestor (i.e. Dues-ACOG-Espey)
 - ii) Travel: Type-Vendor-Traveler-Location (i.e. Airfare-Delta-Espey-Paris)
 - c) Each charge should have a single PDF saved and uploaded (PDFs can be combined into a single PDF using Adobe Acrobat DC)
- 6) Receive order and enter date on PCard Running Log. Note: If you have not yet received the order, but the charge shows up in Chrome River, wait until you receive the packing slip before reallocating.
- 7) Complete weekly Expense Report for all available charges in Chrome River.
 - a) See job aide <http://Chrome.River.unm.edu/pcard/jobaids.html>

- b) Name the New Expense Report (first or last name is fine due to character limits; use Monday for day):
 - i) Name PCard week of ##/##/##
 - ii) Name PCard Travel week of ##/##/##
- c) Choose the correct report type
 - i) PCard (i.e. not travel)
 - ii) PCard Travel (e.g. conference registration, hotel, airfare)
- d) Under Business Purpose type reconciliation.
- e) As receipt/support PDFs are uploaded to Chrome River, move the saved PDF from the Pending Receipts to Completed folder using cut and paste.
- f) Include the charge reconciliation date on your log.
- g) Submit report
 - i) Once submitted, the report will be reviewed/approved by the Accounting Manager

APPROVAL

Prepared by: Accounting

Approved by: 

Approval: n/a _____
 Chair, Department of Obstetrics & Gynecology Date

| SOP # / Version # | Effective Date | Supersedes | Review Date | Summary of Change(s) |
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