

Pcard Paperwork Instructions for Shipments to the Center

UF/IFAS CREC receives on average dozens of packages a day. These shipments contain important materials and supplies for ongoing research and Extension activities. It is essential that all faculty and staff follow the established procedures that support the efficient delivery of these materials to their intended recipients. The University of Florida also has established procedures for shipping and receiving to ensure appropriate and accountable internal financial controls.

All employees are expected to understand and comply with these internal procedures to ensure the appropriate policies are followed. Thank you for your support in creating a safe and secure workplace.

The following provides a step-by-step guide on how to ensure that your packages find their way to you in the fastest way possible.

1. When placing the order online or by phone, remember to print to a PDF file one of the following: the sales order, the quote, or the confirmation of the order or if placing the order through my UF Market the requisition/purchase order.
2. Once you have placed an order to be shipped to CREC, immediately follow up with CREC DocuSign templates.
3. Next, log in to DocuSign and use the following templates: P-Card Shipping Receiving template and if ordered through my UF Market use the CREC myUF Market purchases template.
4. Once you have the DocuSign template filled out with proper allocation and/or scientific justification and have uploaded your PDF file information of the order, forward the document to the proper faculty/supervisor for chartfield and signature approval (look for a prompt on the DocuSign template on how to forward). This order will then be automatically sent to

the receiving department after the supervisor approves so the documents can be matched to the item when it is received in the shipping area.

If CREC Shipping and Receiving does not have the paperwork for items coming in by the time that the item is actually received at CREC, you and your supervisor will be contacted by email. You will have 48 hours to make sure the items delivered have the proper paperwork to go with the approved order. The items will be locked up until the paperwork is received.

IMPORTANT INFORMATION: Penalties for repeated failure to complete paperwork

Providing the appropriate paperwork is critical for the receiving operations to function. We understand that at times paperwork will get overlooked. However, if items are ordered and received at CREC without the proper paperwork more than 3 times within a month, the business office will place your pcard on hold until you have retaken and passed the proper classes.

If a faculty/supervisor is on vacation, leave or etc. it is their responsibility to make sure another faculty/supervisor can sign in their place so paper flow will not be delayed.

If you have packages being sent to the CREC that haven't been purchased on a p-card, please make sure to let Shipping and Receiving know to expect the package. Any unexpected packages will be placed aside until time allows shipping and receiving to investigate who it belongs to.

Thank you for your help and cooperation.

<https://crec.ifas.ufl.edu/resources/employee-resources/business-office/>