

Create a Delegation

The Cardholder, Reconciler, Approver, and Department Card Manager (DCM) can create a delegation. There are measures in the P-Card software that will not allow the creation of a delegation if it enables a Cardholder to reconcile or approve their own transactions.

Step	Task
1.	Login to the P-Card Software .
2.	Select Delegate from the File menu. NOTE: In the Delegation Set Up screen, the name(s) of the established delegates are listed under <i>Active Delegations</i> .
3.	Enter only the person's last name (case sensitive) in the Name (Last, First): field to find an employee.
4.	Click the Find button.
5.	Click the Load icon that corresponds with the employee's name.
6.	Enter the start date in the Start Date: field for when the delegation will begin.
7.	Enter the end date in the End Date: field for when the delegation will end. If this field is left blank, the delegation will be ongoing.
8.	Click the Add Delegation button.
9.	Repeat steps 3 through 7 to add more delegates.
10.	Select Log Off from the File menu.

Please contact [UPAY Card Services](#) should you have any questions.

UPAY Card Services

Phone: 217-244-9300

Toll-free: 800-260-9113

Fax: 217-239-6735

Email: cco@uillinois.edu