



## Change PCard Information

**Overview:** This job aid demonstrates how to make select changes to PCard information: physical address, phone number, email address, purchase limits, account numbers, and organization codes. Other updates to cardholder information (including legal name changes) require the cancellation of the active PCard ([see 24TUT08](#)) and submission of a new PCard application once the cardholder information is corrected in the HR system.

### Locate the PCard Maintenance Document (PCMD)

1. Log in to [ebs.msu.edu](https://ebs.msu.edu) and click the **Financial System** tab.
2. In the Lookup and Maintenance column, click the **Procurement Card Maintenance** link under the section titled Procurement Card (PCard).

<p><b>Transactions</b></p> <p><b>Accounts Receivable</b></p> <ul style="list-style-type: none"> <li>Cash Control</li> <li>Customer Credit Memo</li> <li>Customer Invoice</li> <li>Customer Invoice Writeoff</li> <li>Multiple Customer Invoice Writeoff</li> <li>Payment Application</li> <li>Transfer Unapplied Payment Application</li> </ul> <p><b>Financial Processing</b></p> <ul style="list-style-type: none"> <li>Advance Deposit</li> <li>Auxiliary Voucher</li> <li>Budget Adjustment</li> <li>Cash Receipt</li> <li>Credit Card Receipt</li> <li>Disbursement Voucher</li> <li>Distribution of Income and Expense</li> <li>General Error Correction</li> <li>Indirect Cost Adjustment</li> <li>Internal Billing</li> <li>Intra-Account Adjustment</li> <li>Pre-Encumbrance</li> <li>Transfer of Funds</li> </ul> <p><b>Purchasing/Accounts Payable</b></p> <ul style="list-style-type: none"> <li>Contract Manager Assignment</li> <li>Payment Request</li> <li>Requisition</li> <li>Vendor Credit Memo</li> </ul>	<p><b>Lookup and Maintenance</b></p> <p><b>Capital Asset Builder</b></p> <ul style="list-style-type: none"> <li>Pre-Asset Tagging</li> </ul> <p><b>Capital Asset Management</b></p> <ul style="list-style-type: none"> <li>Asset</li> <li>Asset Fabrication</li> <li>Asset Global (Add)</li> <li>Asset Location Global</li> <li>Asset Payment</li> <li>Asset Retirement Global</li> <li>Asset Transfer Global</li> </ul> <p><b>Chart of Accounts</b></p> <ul style="list-style-type: none"> <li>Account</li> <li>Account Global</li> <li>Account Delegate</li> <li>Account Delegate Global</li> <li>Account Delegate Inactivate</li> <li>Account Delegate Model</li> <li>Account Delegate Global From Model</li> <li>Financial Reporting Code</li> <li>Mission Code</li> <li>Object Code</li> <li>Object Code Global</li> <li>Organization</li> <li>Organization Review</li> <li>Program/Initiative Code</li> <li>Project Code</li> <li>Project Code Import</li> <li>Sub-Account</li> <li>Sub-Account Import</li> <li>Sub-Object Code</li> <li>Sub-Object Code Global</li> <li>Sub-Object Code Global Edit</li> <li>Sub-Object Code Import</li> <li>Use of Funds</li> </ul> <p><b>PCard</b></p> <ul style="list-style-type: none"> <li><b>PCard Maintenance</b></li> <li>PCard Transactions</li> </ul> <p><b>Spartan Marketplace</b></p> <ul style="list-style-type: none"> <li>Order Auto Limit</li> </ul> <p><b>Vendor</b></p> <ul style="list-style-type: none"> <li>Vendor</li> <li>Vendor Contracts</li> </ul>	<p><b>Custom Document Searches</b></p> <p><b>Financial Transactions</b></p> <p><b>Accounts Receivable</b></p> <ul style="list-style-type: none"> <li>Cash Controls</li> <li>Customer Credit Memos</li> <li>Customer Invoices</li> <li>Customer Invoice Writeoffs</li> <li>Payment Applications</li> <li>Transfer Unapplied Payment Applications</li> </ul> <p><b>Capital Asset Management</b></p> <ul style="list-style-type: none"> <li>Asset Maintenance</li> </ul> <p><b>Financial Processing</b></p> <ul style="list-style-type: none"> <li>Disbursement Vouchers</li> </ul> <p><b>Purchasing/Accounts Payable</b></p> <ul style="list-style-type: none"> <li>Electronic Invoice Rejects</li> <li>Payment Requests</li> <li>Purchase Orders</li> <li>Requisitions</li> <li>Vendor Credit Memos</li> </ul>
<p><b>Administrative Transactions</b></p> <p><b>Accounts Receivable</b></p> <ul style="list-style-type: none"> <li>Billing Statement Generation</li> <li>Customer Invoice Generation</li> </ul> <p><b>Capital Asset Builder</b></p> <ul style="list-style-type: none"> <li>Capital Asset Builder AP Transactions</li> <li>Capital Asset Builder GL Transactions</li> </ul> <p><b>Capital Asset Management</b></p> <ul style="list-style-type: none"> <li>Asset Manual Payment</li> <li>Barcode Inventory Process</li> </ul> <p><b>Financial Processing</b></p> <ul style="list-style-type: none"> <li>General Ledger Correction Process</li> <li>Journal Voucher</li> <li>Non-Check Disbursement</li> <li>Service Billing</li> <li>Service Provider Billing Upload</li> </ul> <p><b>System</b></p> <ul style="list-style-type: none"> <li>Electronic Fund Transfer</li> </ul>	<p><b>Year End Transactions</b></p> <p><b>Capital Asset Management</b></p> <ul style="list-style-type: none"> <li>Year End Depreciation</li> </ul> <p><b>Financial Processing</b></p> <ul style="list-style-type: none"> <li>Year End Budget Adjustment</li> <li>Year End Distribution of Income and Expense</li> <li>Year End General Error Correction</li> <li>Year End Intra-Account Adjustment</li> <li>Year End Transfer of Funds</li> </ul>	<p><b>Balance Inquiries</b></p> <p><b>General Ledger</b></p> <ul style="list-style-type: none"> <li>Available Balances</li> <li>Balances by Consolidation</li> <li>Cash Balances</li> <li>General Ledger Balance</li> <li>General Ledger Entry</li> <li>General Ledger Pending Entry</li> <li>Open Encumbrances</li> <li>Current Account Balances</li> </ul> <p><b>Reports</b></p> <p><b>Accounts Receivable</b></p> <ul style="list-style-type: none"> <li>Customer Aging Report</li> <li>Customer History Detail Report</li> <li>Customer History Summary Report</li> <li>Customer Unapplied Payment Detail Report</li> <li>Customer Unapplied Payment Summary Report</li> <li>Outstanding Invoice Report</li> <li>Payment History Report</li> </ul> <p><b>General Ledger</b></p> <ul style="list-style-type: none"> <li>Trial Balance</li> </ul>



- On the Procurement Card Lookup screen, search for the PCard you would like to edit, using any of the available options.

Procurement Card Lookup create new  
\* required field

Procurement Cardholder MSU NetID:	<input type="text"/>
Procurement Card Number:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Default Account:	<input type="text"/>
Fiscal Officer Principal Name:	<input type="text"/>
Default Org Code:	<input type="text"/>
Backup Account:	<input type="text"/>
Card Status:	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

- After locating the card, click **edit**.

**kuali** financial systems Provide F  
Main Menu Maintenance Administration KFS-3.0\_MSU-1.0.0 B

action list doc search Logged in User: krebillk

Procurement Card Lookup create r  
\* require

Procurement Cardholder MSU NetID:	<input type="text"/>
Procurement Card Number:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Default Account:	<input type="text"/>
Fiscal Officer Principal Name:	<input type="text"/>
Default Org Code:	<input type="text"/>
Backup Account:	<input type="text"/>
Card Status:	Active
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

One item retrieved.

Actions	Procurement Card Number	Cardholder Name	Procurement Cardholder MSU NetID	Default Org Code	Default Account	Fiscal Officer	Backup Account	Card Status	Card Cancel St
<input type="button" value="edit"/>	*****6893			10074876				Active	

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

- The PCard Maintenance eDoc will open. Complete the **Description** and **Explanation** fields.

Document Overview hide

\* Description:

Organization Document Number:

Explanation:

MSU Cardholder Information hide

Old New

- On the **MSU Cardholder Information** tab, the old (current) information is displayed on the left and the new (editable) information on the right. Changes will be indicated with a yellow asterisk.



## Contact information

1. On the first **MSU Cardholder Information** tab, under the new (righthand) side, navigate to the appropriate contact information field:
  - a. **MSU Address Line 1, MSU Address Line 2, City, State, Postal Code, and Country** should all reflect the cardholder’s MSU campus address.
    - i. **Note:** The initial cardholder address is extracted from the MSU employee profile in the Human Resource system. If an edit to the HR profile is necessary, please contact the cardholder’s unit administrator to update the address information.
  - b. The **Phone Number** field can be the cardholder’s MSU phone number or their cell phone number.
  - c. The **MSU Email** field must be the cardholder’s MSU email address.

2. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account’s fiscal officer, and the PCard team for approval.



## Purchase limits

1. Two default monthly spending limits are available: \$25,000 and \$50,000. [A higher limit may be requested via the PCard Exception Request form](#) and must be approved before the submission of a PCMD applying the change.
2. On the second **MSU Cardholder Information** tab, under the new (righthand) side, navigate to the **Monthly Spending Limit** field.
3. Enter the new spending limit number in dollars: 25,000; 50,000; or the approved higher spending limit.



* Default Chart:	MS
* Default Account:	
Default Account Name:	
Default Account Expiration:	
Fiscal Officer Principal Name:	
Backup Chart:	MS
Backup Account:	
Default Object Code:	6559
* Monthly Spending Limit:	
Single Purchase Limit:	5,000.00

4. If the spending limit was approved via a PCard Exception Request form, attach the approval email from the PCard team to the PCMD eDoc under **Notes and Attachments**.

Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:			Choose File   No file chosen	Other		add

5. If the Default Account or Backup Account are associated with the MSU Contract and Grant Administration (CGA), an appropriate CGA approval group must be added to the ad hoc routing.
- Expand the **Ad Hoc Recipients** tab of the eDoc.

**Ad Hoc Recipients** ▶ show

- Under **Ad Hoc Group Requests**, select the magnifying glass next to the **Name** field.

* Action Requested	* Person	Actions
APPROVE		add

  

* Action Requested	* Namespace Code	* Name	Actions
APPROVE			add

- Search for **\*CGA\*** in the Group Name field.

Group Id:	
Group Namespace:	
Group Name:	*CGA*
Group Description:	
Type:	
Active?:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Principal Name:	

search clear cancel

- Click **return value** for the appropriate CGA processor group for the account number.

Return Value	Group Type Name	Group Namespace	Group Name
return value	Default	KFS-SYS	CGA Processor Level 1
return value	Default	KFS-SYS	CGA Processor Level 2

- Click add in the **Actions** column.

* Action Requested	* Namespace Code	* Name	Actions
APPROVE	KFS-SYS	CGA Processor 1	add



- 6. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account's fiscal officer, and the PCard team for approval.
  - a. **Note:** the PCard team will adjust the single purchase limit to the appropriate default amount or an approved amount as indicated by the PCard Exception Request form.



## Account numbers

- 1. On the second **MSU Cardholder Information** tab, under the new (righthand) side, navigate to the **Default Account** field. If known, enter the account number. Otherwise, click the magnifying glass icon to look it up.

* Default Chart:	MS	
* Default Account:		
Default Account Name:		
Default Account Expiration:		
Fiscal Officer Principal Name:		
Backup Chart:	MS	
Backup Account:		

- 2. After the account number is populated, the account details will auto-populate in the **Default Account Name**, **Default Account Expiration** (if applicable), and **Fiscal Officer Principal Name** fields. Use these fields to ensure the correct account is being assigned to the PCard.
- 3. Follow the same process for selecting a **Backup Account**, if needed.
- 4. If the Default Account or Backup Account are associated with the MSU Contract and Grant Administration (CGA), an appropriate CGA approval group must be added to the ad hoc routing.
  - a. Expand the **Ad Hoc Recipients** tab of the eDoc.



- b. Under **Ad Hoc Group Requests**, select the magnifying glass next to the **Name** field.

Ad Hoc Recipients			
Ad Hoc Recipients <span>hide</span>			
<b>Person Requests:</b>			
* Action Requested	* Person	Actions	
APPROVE	<input type="text"/>	<input type="button" value="add"/>	
<b>Ad Hoc Group Requests:</b>			
* Action Requested	* Namespace Code	* Name	Actions
APPROVE	<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

- c. Search for **\*CGA\*** in the Group Name field.

Group Id:	<input type="text"/>
Group Namespace:	<input type="text"/>
Group Name:	CGA*
Group Description:	<input type="text"/>
Type:	<input type="text"/>
Active?:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Principal Name:	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

- d. Click **return value** for the appropriate CGA processor group for the account number.



Return Value	Group Type Name	Group Namespace	Group Name
return value	Default	KFS-SYS	CGA Processor Level 1
return value	Default	KFS-SYS	CGA Processor Level 2

e. Click add in the **Actions** column.

5. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account’s fiscal officer, and the PCard team for approval.
  - a. **Note:** the PCard team will adjust the single purchase limit to the appropriate default amount or an approved amount as indicated by the PCard Exception Request form.



## Organization code

1. When a cardholder changes departments or organizations, their PCard can move with them.
2. On the second **MSU Cardholder Information** tab, under the new (righthand) side, navigate to the **Default Org Code** field. If known, enter the org code. Otherwise, click the magnifying glass icon to look it up.

3. After the org code is populated, the **Default Org Name** will auto-populate. Use this field to ensure the correct org code is being assigned to the PCard.
4. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account’s fiscal officer, and the PCard team for approval.
  - a. **Note:** the PCard team will adjust the single purchase limit to the appropriate default amount or an approved amount as indicated by the PCard Exception Request form.

