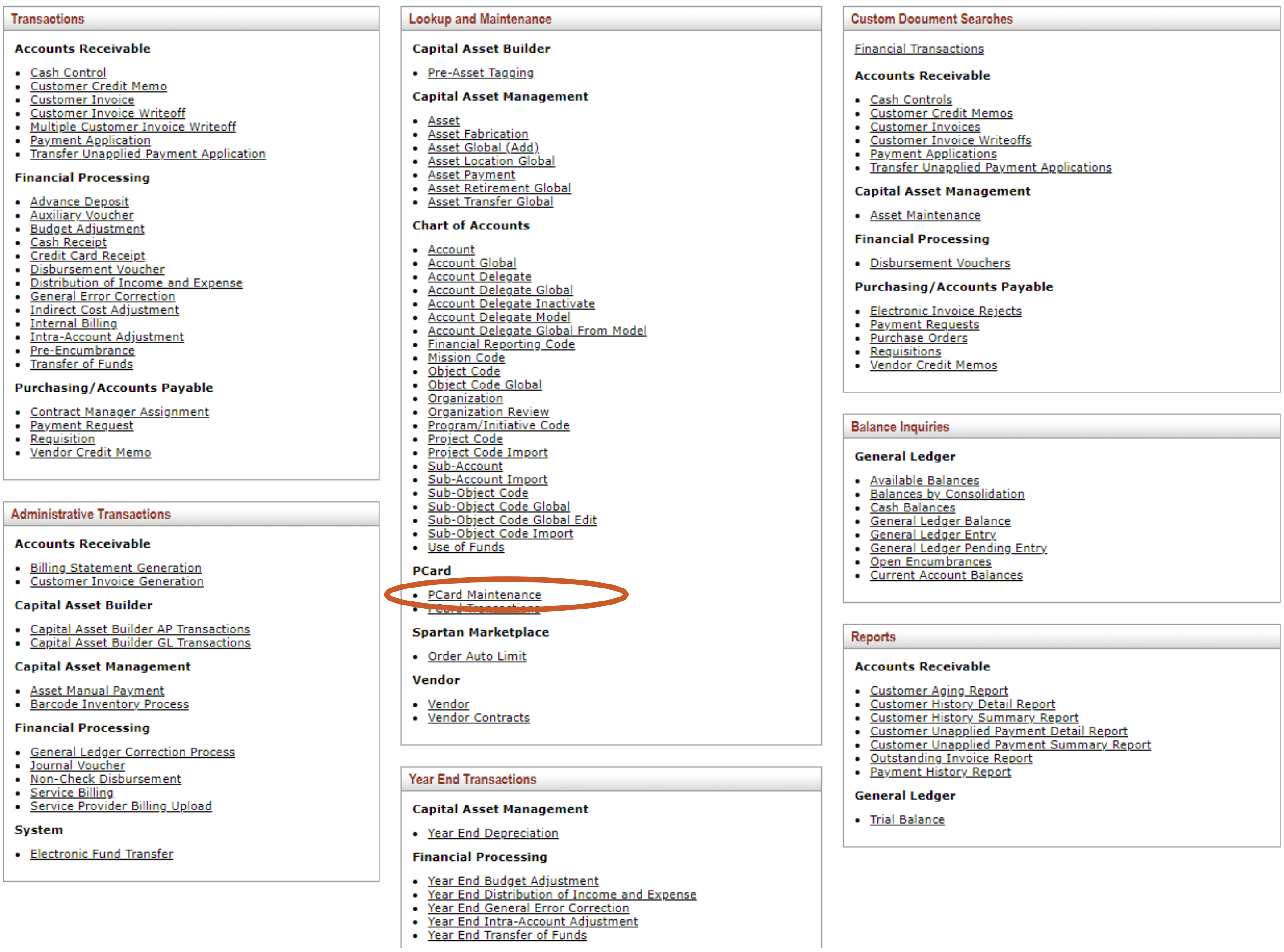
Change PCard Information

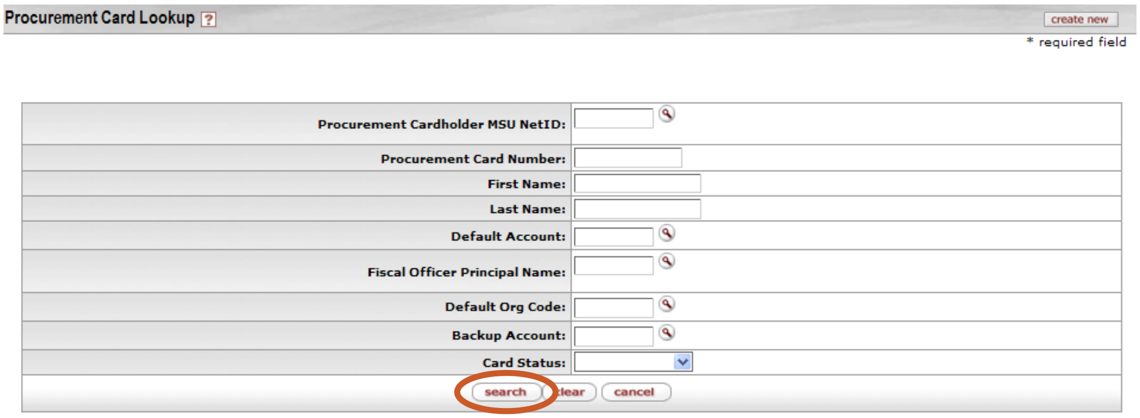
Overview: This job aid demonstrates how to make select changes to PCard information: physical address, phone number, email address, purchase limits, account numbers, and organization codes. Other updates to cardholder information (including legal name changes) require the cancellation of the active PCard (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)

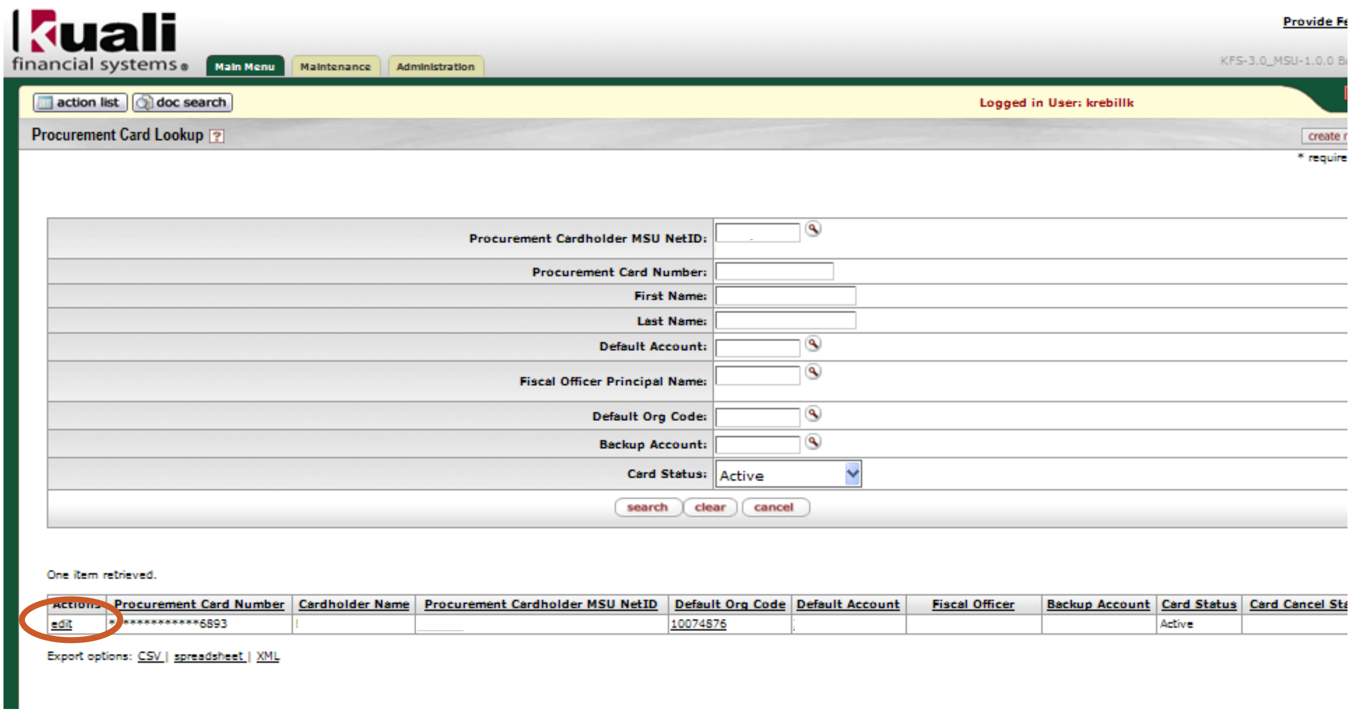
1. Log in to ebs.msu.edu and click the **Financial System** tab.
2. In the Lookup and Maintenance column, click the **Procurement Card Maintenance** link under the section titled Procurement Card (PCard).



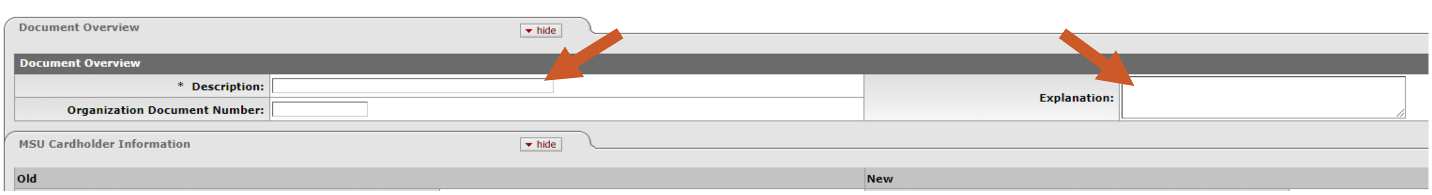
3. On the Procurement Card Lookup screen, search for the PCard you would like to edit, using any of the available options.



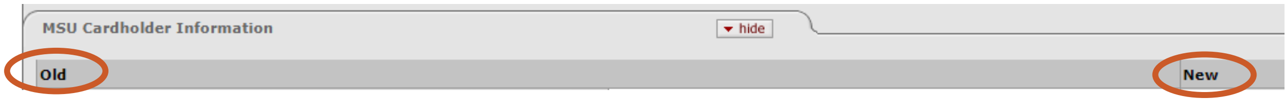
4. After locating the card, click **edit.**



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

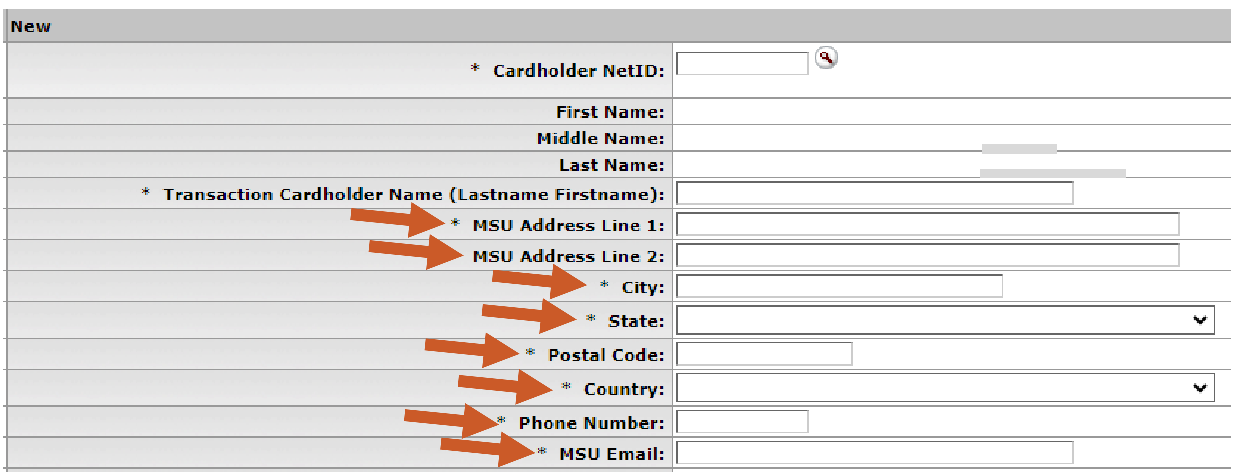


6. On the **MSU Cardholder Information** tab, the old (current) information is displayed on the left and the new (editable) information on the right. Changes will be indicated with a yellow asterisk.

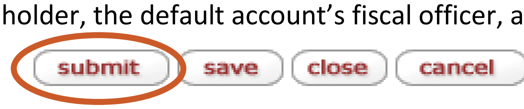


Contact information

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.

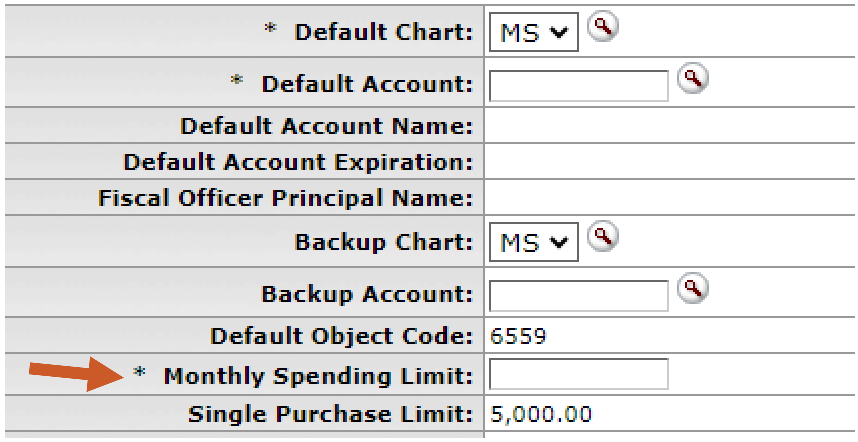


2. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account's fiscal officer, and the PCard team for approval.



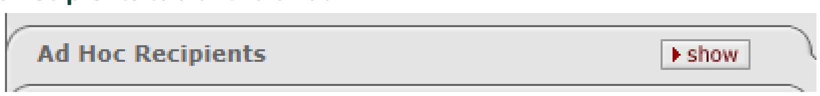
Purchase limits

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.

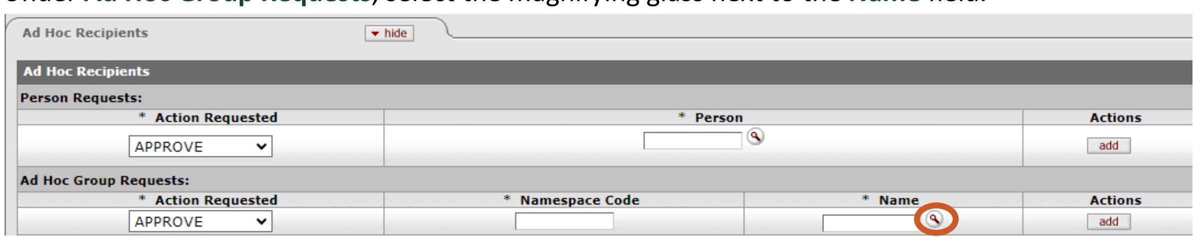


4. If the spending limit was approved via a PCard Exception Request form, attach the approval email from the PCard team to the PCMD eDoc under **Notes and Attachments**.

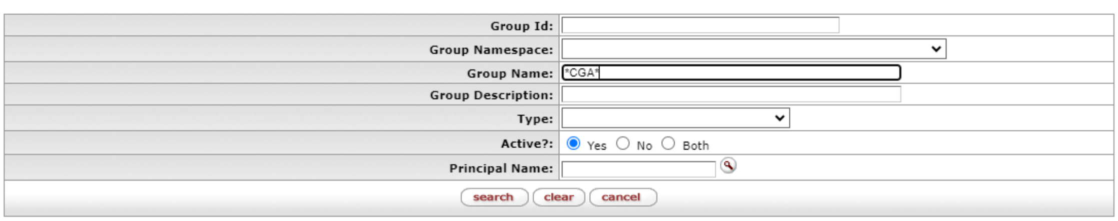
5. If the Default Account or Backup Account are associated with the MSU Contract and Grant Administration (CGA), an appropriate CGA approval group must be added to the ad hoc routing.
    a. Expand the **Ad Hoc Recipients tab** of the eDoc.



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



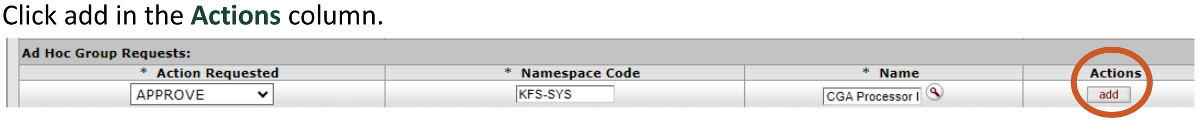
    c. Search for ***CGA*** in the Group Name field.



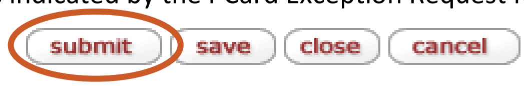
    d. Click **return value** for the appropriate CGA processor group for the account number.

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.

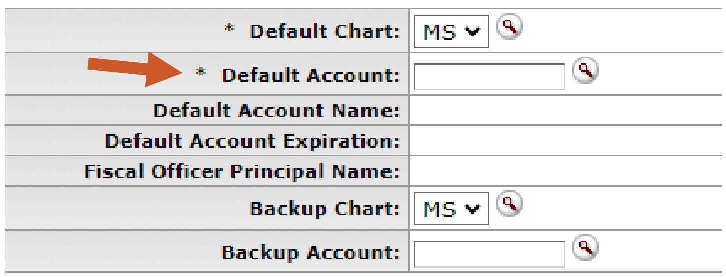


6. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account's fiscal officer, and the PCard team for approval.
    a. **Note:** the PCard team will adjust the single purchase limit to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

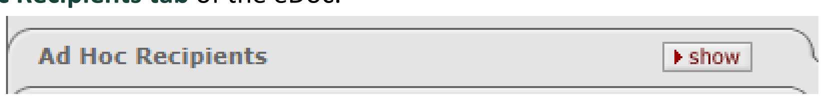


Account numbers

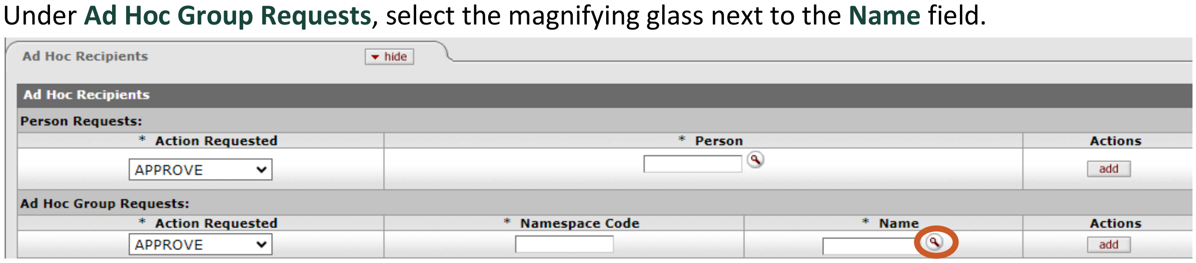
1. On the second **MSU Cardholder Information** tab, under the new (righthand) side, navigate to the **Default Account** field. If known, enter the account number. Otherwise, click the magnifying glass icon to look it up.



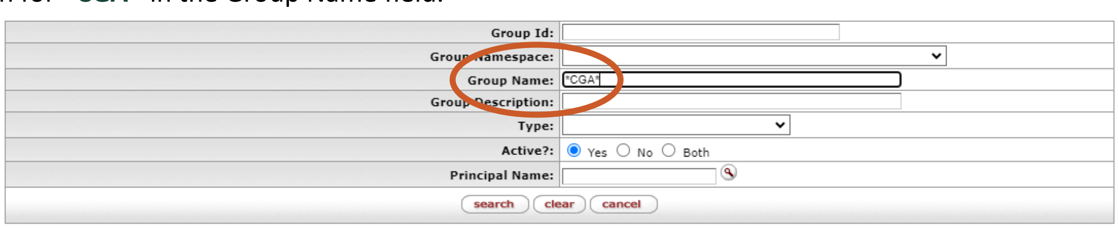
2. After the account number is populated, the account details will auto-populate in the **Default Account Name**, **Default Account Expiration** (if applicable), and **Fiscal Officer Principal Name** fields. Use these fields to ensure the correct account is being assigned to the PCard.
3. Follow the 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.



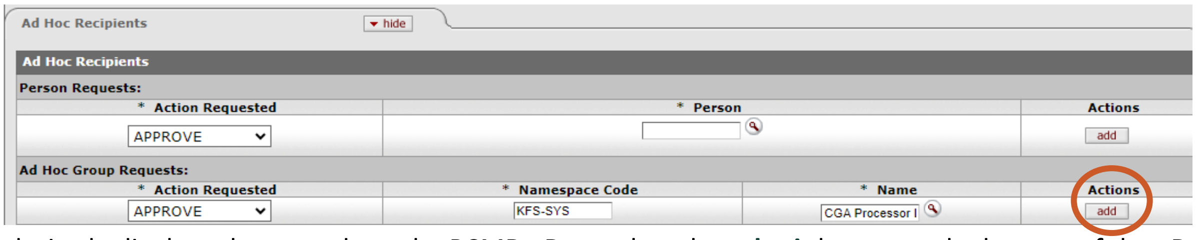
    c. Search for ***CGA*** in the Group Name field.



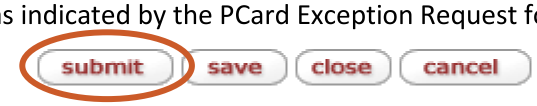
    d. Click **return value** for the appropriate CGA processor group for the account number.

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.

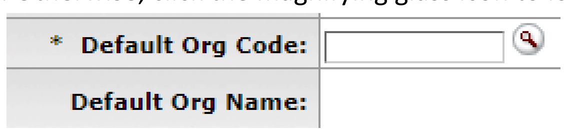


5. Once all desired edits have been made to the PCMD eDoc, select the **submit** button at the bottom of the eDoc. The eDoc will be routed to the cardholder, the default account's fiscal officer, and the PCard team for approval.
    a. **Note:** the PCard team will adjust the single purchase limit to 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.