



Apply for a Michigan State University PCard

Overview: This job aid demonstrates the application process for obtaining a Michigan State University PCard. Each cardholder is limited to one PCard unless otherwise approved by the PCard team via a PCard Exception Request form.

Before applying

1. Once a need for a PCard is identified, the prospective cardholder must complete the online PCard training.
2. After completing training, the prospective cardholder is required to fill out and sign a [Cardholder Agreement form](#), indicating that they understand the program policies and procedures and that the credit card will not be misused.
3. An appropriate departmental supervisor, fiscal officer, dean, director, or chairperson needs to approve the employee as a PCard cardholder via a signature on the Cardholder Agreement form.

Application submission

1. Following the completion of the steps above, the prospective cardholder needs to login to ebs.msu.edu to submit their application.
2. Click the **Financial System** tab.
3. In the Lookup and Maintenance column, click the **Procurement Card Maintenance** link under the section titled Procurement Card (PCard).
 - a. This will create a PCard Maintenance Document (PCMD) eDoc.

The screenshot shows the application menu with the following sections:

- Transactions**
 - Financial Processing
 - Advance Deposit
 - Auxiliary Voucher
 - Budget Reallocation
 - Cash Receipt
 - Credit Card Receipt
 - Disbursement Voucher
 - Distribution of Income and Expense
 - General Error Correction
 - Indirect Cost Adjustment
 - Internal Billing
 - Pre-Encumbrance
 - Transfer of Funds
 - Intra Account Adjustment
 - Purchasing/Accounts Payable
 - Contract Manager Assignment
 - Payment Request
 - Invoice Request
 - Requisition
 - Vendor Credit Memo
 - Administrative Transactions
 - Capital Asset Builder
 - Capital Asset Builder AP Transactions
 - Capital Asset Builder GL Transactions
 - Capital Asset Management
 - Asset Manual Payment
 - Barcode Inventory Process
 - Financial Processing
 - General Ledger Correction Process
- Lookup and Maintenance**
 - Capital Asset Builder
 - Pre-Asset Tagging
 - Capital Asset Management
 - Asset
 - Asset Fabrication
 - Asset Global (Add)
 - Asset Location Global
 - Asset Payment
 - Asset Retirement Global
 - Chart of Accounts
 - Account
 - Account Global
 - Account Delegate
 - Account Delegate Global
 - Account Delegate Model
 - Account Delegate Global From Model
 - Financial Reporting Code
 - Mission Code
 - Object Code
 - Object Code Global
 - Organization
 - Organization Review
 - Program/Initiative Code
 - Project Code
 - Project Code Import
 - Sub-Account
 - Sub-Account Import
 - Sub-Object Code
 - Sub-Object Code Global
 - Sub-Object Code Import
 - Use of Funds
 - Procurement Card (Pcard)
 - Procurement Card Maintenance** (circled in red)
 - PCard Transactions
- Custom Document Searches**
 - Financial Transactions
 - Capital Asset Management
 - Asset Maintenance
 - Financial Processing
 - Disbursement Vouchers
 - Purchasing/Accounts Payable
 - Electronic Invoice Rejects
 - Payment Requests
 - Invoice Requests
 - Purchase Orders
 - Requisitions
 - Vendor Credit Memos
- Balance Inquiries**
 - General Ledger
 - Available Balances
 - Balances by Consolidation
 - Cash Balances
 - General Ledger Balance
 - General Ledger Entry
 - General Ledger Pending Entry
 - Open Encumbrances
 - Current Account Balance
- Reports**
- System**

4. On the Procurement Card Lookup screen, click **Create New**.

The screenshot shows the Procurement Card Lookup screen with the following elements:

- action list | doc search
- Logged in User: krebillk
- Logout
- Procurement Card Lookup ?
- create new** (circled in red)
- * required field



5. Complete the required fields in the resulting PCard application eDoc.

action list | doc search | Logged in User: krebillk | Logout

Pcard Maintenance ?

Doc Nbr:	2037950	Status:	INITIATED
Initiator:		Created:	

expand all | collapse all
* required field

Document Overview ▼ hide

Document Overview

* Description:

Org. Doc. #:

Explanation:

MSU Procurement Cardholder Information ▼ hide

New

* Procurement Cardholder MSU NetID: 🔍

First Name:

Middle Name:

6. In the **Notes and Attachments** section, attach the completed and signed [Cardholder Agreement form](#).

7. Click **Submit** at the bottom of the page to process the application.

- a. **Note:** the eDoc will automatically route to the default account's fiscal officer for approval, and then to the PCard team for processing. Failure to complete the outlined steps above will result in the disapproval of the application eDoc.