PCard Cancellation and Suspension

Overview: This job aid demonstrates how to suspend a PCard when no longer needed or how to cancel a PCard due to a legal name change, lack of need, or following the departure of a cardholder from the university. Before leaving MSU, cardholders should cancel their own PCard.

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).

If you have any questions, please contact the PCard team at (517) 884-6080 or pcard@msu.edu.
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 indicating the reason for cancellation or suspension of the PCard.
Cancellation

1. To cancel a PCard, navigate to the Card Status dropdown menu under the second MSU Cardholder Information tab. Select Cancel.

![Card Status dropdown menu](image)

2. The three fields immediately following Card Status also need to be completed:
   a. Card Cancel Reason
      i. Indicate the reason the card is being canceled (e.g., card no longer needed, legal name change, employee leaving the university).
   b. Cancel Effective Date
      i. Select the date the cancellation should go into effect. This should be on or before the employee’s last day with MSU, in the case of departing employees.
   c. Card Cancel Status
      i. Select the appropriate reason for the cancellation.
        1. Closed: PCard is no longer needed.
        2. Lost/Stolen: PCard was lost or stolen, and a replacement will need to be issued; ensure all steps for reporting the PCard as lost/stolen have been completed.
        3. Terminated: The cardholder is leaving or has left the university.

3. 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: If the eDoc routes to the cardholder, but the cardholder is no longer with the university, the fiscal officer must email the Controller’s Office the eDoc number and request super-user approval or the eDoc will remain as in progress and the PCard will not be canceled.

Suspension

1. To suspend a PCard, navigate to the Card Cancel Status dropdown menu under the second MSU Cardholder Information tab. Select Suspended.

   a. Note: The Card Status should be Active, not Cancel.
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.

Ending card suspension

1. To remove the suspension of a PCard, navigate to the Card Cancel Status dropdown menu under the second MSU Cardholder Information tab. Select the blank option.
   a. Note: The Card Status should remain as Active.

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.