



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).

<p>Transactions</p> <p>Accounts Receivable</p> <ul style="list-style-type: none"> Cash Control Customer Credit Memo Customer Invoice Customer Invoice Writeoff Multiple Customer Invoice Writeoff Payment Application Transfer Unapplied Payment Application <p>Financial Processing</p> <ul style="list-style-type: none"> Advance Deposit Auxiliary Voucher Budget Adjustment Cash Receipt Credit Card Receipt Disbursement Voucher Distribution of Income and Expense General Error Correction Indirect Cost Adjustment Internal Billing Intra-Account Adjustment Pre-Encumbrance Transfer of Funds <p>Purchasing/Accounts Payable</p> <ul style="list-style-type: none"> Contract Manager Assignment Payment Request Requisition Vendor Credit Memo 	<p>Lookup and Maintenance</p> <p>Capital Asset Builder</p> <ul style="list-style-type: none"> Pre-Asset Tagging <p>Capital Asset Management</p> <ul style="list-style-type: none"> Asset Asset Fabrication Asset Global (Add) Asset Location-Global Asset Payment Asset Retirement Global Asset Transfer Global <p>Chart of Accounts</p> <ul style="list-style-type: none"> Account Account Global Account Delegate Account Delegate Global Account Delegate Inactivate 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 Global Edit Sub-Object Code Import Use of Funds <p>PCard</p> <ul style="list-style-type: none"> PCard Maintenance PCard Transactions <p>Spartan Marketplace</p> <ul style="list-style-type: none"> Order Auto Limit <p>Vendor</p> <ul style="list-style-type: none"> Vendor Vendor Contracts <p>Year End Transactions</p> <p>Capital Asset Management</p> <ul style="list-style-type: none"> Year End Depreciation <p>Financial Processing</p> <ul style="list-style-type: none"> Year End Budget Adjustment Year End Distribution of Income and Expense Year End General Error Correction Year End Intra-Account Adjustment Year End Transfer of Funds 	<p>Custom Document Searches</p> <p>Financial Transactions</p> <p>Accounts Receivable</p> <ul style="list-style-type: none"> Cash Controls Customer Credit Memos Customer Invoices Customer Invoice Writeoffs Payment Applications Transfer Unapplied Payment Applications <p>Capital Asset Management</p> <ul style="list-style-type: none"> Asset Maintenance <p>Financial Processing</p> <ul style="list-style-type: none"> Disbursement Vouchers <p>Purchasing/Accounts Payable</p> <ul style="list-style-type: none"> Electronic Invoice Rejects Payment Requests Purchase Orders Requisitions Vendor Credit Memos <p>Balance Inquiries</p> <p>General Ledger</p> <ul style="list-style-type: none"> Available Balances Balances by Consolidation Cash Balances General Ledger Balance General Ledger Entry General Ledger Pending Entry Open Encumbrances Current Account Balances <p>Reports</p> <p>Accounts Receivable</p> <ul style="list-style-type: none"> Customer Aging Report Customer History Detail Report Customer History Summary Report Customer Unapplied Payment Detail Report Customer Unapplied Payment Summary Report Outstanding Invoice Report Payment History Report <p>General Ledger</p> <ul style="list-style-type: none"> Trial Balance
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- On the Procurement Card Lookup screen, search for the PCard you would like to edit, using any of the available options.

The screenshot shows the 'Procurement Card Lookup' form. At the top, there are tabs for 'action list' and 'doc search', and a 'Logout' button. The user is logged in as 'krebillk'. The form contains several input fields: Procurement Cardholder MSU NetID, Procurement Card Number, First Name, Last Name, Default Account, Fiscal Officer Principal Name, Default Org Code, Backup Account, and Card Status (a dropdown menu). At the bottom of the form, there are three buttons: 'search', 'clear', and 'cancel'. The 'search' button is circled in red.

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

The screenshot shows the 'Procurement Card Lookup' form with search results. The 'search' button is circled in red. Below the form, a message says 'One item retrieved.' Below that is a table with the following columns: Action, Procurement Card Number, Cardholder Name, Procurement Cardholder MSU NetID, Default Org Code, Default Account, Fiscal Officer, Backup Account, Card Status, and Card Cancel Sta. The 'edit' button in the 'Action' column is circled in red. Below the table, there are export options: CSV, spreadsheet, and XML.

- The PCard Maintenance eDoc will open. Complete the **Description** and **Explanation** fields indicating the reason for cancellation or suspension of the PCard.

The screenshot shows the 'PCard Maintenance' eDoc form. At the top, there are tabs for 'action list' and 'doc search', and a 'Logout' button. The user is logged in as 'kbaer'. The form contains several input fields: Doc Nbr (26363438), Status (INITIATED), Initiator (kbaer), and Created (03:39 PM 05/06/20). Below the form, there are two buttons: 'expand all' and 'collapse all'. The 'Description' and 'Explanation' fields are circled in red.



Cancellation

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

- The three fields immediately following Card Status also need to be completed:
 - Card Cancel Reason**
 - Indicate the reason the card is being canceled (e.g., card no longer needed, legal name change, employee leaving the university).
 - Cancel Effective Date**
 - 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.
 - Card Cancel Status**
 - Select the appropriate reason for the cancellation.
 - Closed:** PCard is no longer needed.
 - 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](#).
 - Terminated:** The cardholder is leaving or has left the university.
- 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. For urgent requests such as a terminated employee, contact the PCard team at (517) 884-6080.
 - 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

- To suspend a PCard, navigate to the **Card Cancel Status** dropdown menu under the second **MSU Cardholder Information** tab. Select **Suspended**.
 - Note:** The Card Status should be **Active**, not Cancel.



- 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

- 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.
 - Note:** The Card Status should remain as **Active**.



- 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.

