



## Change PCard Information

**Overview:** This job aid demonstrates how to make changes to PCard information—including name, address, phone number, email address, account numbers, monthly spending limits, and canceling or suspending a PCard—using the Procurement Card Maintenance Document (PCMD).

1. To locate the Procurement Card Maintenance Document (PCMD), 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).

The screenshot shows the navigation menu with three main columns: Transactions, Lookup and Maintenance, and Custom Document Searches. Under the 'Lookup and Maintenance' column, the 'Procurement Card (Pcard)' section is circled in red, and the 'Procurement Card Maintenance' link is also circled in red.

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

The screenshot shows the 'Procurement Card Lookup' screen. At the top, there is a header with 'action list', 'doc search', 'Logged in User: krebillk', and 'Logout'. Below the header, there is a 'create new' button and a note '\* required field'. The main form contains several fields for searching: 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. The 'search' button is circled in red.



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

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Main Menu Maintenance Administration

Logged in User: krebillk

Procurement Card Lookup

Procurement Cardholder MSU NetID: barnaby  
Barnaby, Susan

Procurement Card Number: [ ]

First Name: [ ]

Last Name: [ ]

Default Account: [ ]

Fiscal Officer Principal Name: [ ]

Default Org Code: [ ]

Backup Account: [ ]

Card Status: Active

search clear 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 Sta
<b>edit</b>	*****6893			10074876	XT022914			Active	

Export options: CSV | spreadsheet | XML

The PCard Maintenance eDoc will open with old (current) information on the left and new (editable) information on the right.

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Main Menu Maintenance Administration

Logged in User: kbaer

Logout

PCard Maintenance

Doc Nbr: 26363438 Status: INITIATED

Initiator: kbaer Created: 03:39 PM 05/06/20

expand all collapse all

\* required field

Document Overview

Document Overview

\* Description: [ ] Explanation: [ ]

Organization Document Number: [ ]

MSU Procurement Cardholder Information

Old	New
Procurement Cardholder MSU NetID: [ ]	* Procurement Cardholder MSU NetID: [ ]
First Name: [ ]	First Name: [ ]
Middle Name: [ ]	Middle Name: [ ]
Last Name: [ ]	Last Name: [ ]
Transaction Cardholder Name (Lastname Firstname): [ ]	* Transaction Cardholder Name (Lastname Firstname): [ ]
MSU Address Line 1: ANGELL BLDG	* MSU Address Line 1: ANGELL BLDG
MSU Address Line 2: 166 SERVICE RD	MSU Address Line 2: 166 SERVICE RD
City: EAST LANSING	* City: EAST LANSING
State: MICHIGAN	* State: MICHIGAN
Postal Code: 48824	* Postal Code: 48824
Country: UNITED STATES	* Country: UNITED STATES
Phone Number: [ ]	* Phone Number: [ ]
MSU Email: [ ]	* MSU Email: [ ]
Social Security Number (last four digits) (Secured Info): ****	Social Security Number (last four digits) (Secured Info): ****
Date of Birth (Secured Info): *****	Date of Birth (Secured Info): *****



- First, complete the **Description** and **Explanation** fields. All information on this tab is editable, though only cardholder or a PCard administrator can edit secure information (social security number, date of birth, and mother's maiden name). Changes are indicated with a yellow asterisk.

If you are initiating a time sensitive (immediate) change such as a monthly spending limit or canceling/suspending a PCard, contact the PCard team at (517) 884-6080 and then make the changes in KFS.

Cardholder addresses for the PCMD are extracted from the MSU employee system of record address in the Human Resource application in EBS. If an edit necessary, please contact your unit administrator to update the address information.

### To Cancel a PCard

To cancel a PCard, select the card status **Cancel** from the drop-down menu. You are required to complete all related fields, including the reason for canceling the card. Cancellation requests are routed to the default fiscal officer and the PCard team for approval. For urgent requests, contact the PCard team immediately.



## To Suspend a PCard

To suspend a PCard, leave the card status as **Active**. Complete the remaining fields and select **Suspended** from the dropdown. Click **Submit** to process the PCMD. To unsuspend a card, a second PCMD must be submitted.

* Card Status:	Active
Card Cancel Reason:	
Cancel Effective Date:	
Card Cancel Status:	<ul style="list-style-type: none"><li>Closed</li><li>Lost/Stolen</li><li>Reissue</li><li><b>Suspended</b></li><li>Terminated</li></ul>

## Routing

A PCMD requesting an account number change for a CGA account must be ad hoc routed to the Contract and Grants office prior to submitting to the PCard Team. When a card is edited—with the exception of changing the card status to cancel—the eDoc will route to the cardholder, default account fiscal officer and the PCard team for approval.

*Requests made via the PCard Maintenance table will not be changed with the bank until the PCard team has approved the eDoc. The cardholder and default account fiscal officer will receive an FYI once the PCard team has approved the PCMD.*