

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](#) 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 **PCard Maintenance** link under the section titled PCard.

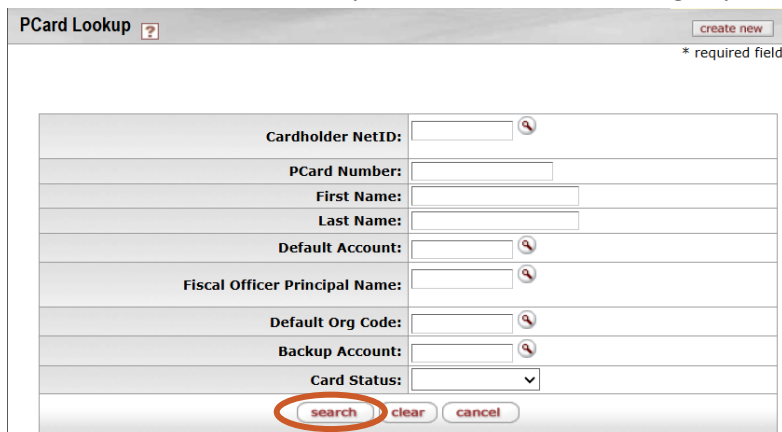
• [Use of Funds](#)

PCard

- [PCard Maintenance](#)
- [PCard Transactions](#)

Spartan Marketplace

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



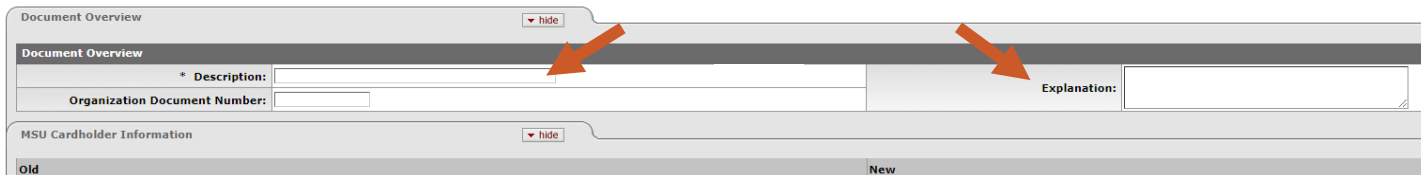
PCard Lookup ? create new
* required field

Cardholder NetID:	<input type="text"/>
PCard Number:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Default Account:	<input type="text"/>
Fiscal Officer Principal Name:	<input type="text"/>
Default Org Code:	<input type="text"/>
Backup Account:	<input type="text"/>
Card Status:	<input type="text"/>
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

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

Actions	PCard Number
edit	*****8590

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



Document Overview hide


* Description:	Explanation:
Organization Document Number:	

MSU Cardholder Information hide

Old	New
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Contact information

- 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.

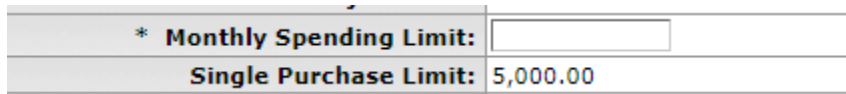


- Under the new (righthand) side, navigate to the appropriate contact information field:
 - MSU Address Line 1, MSU Address Line 2, City, State, Postal Code, and Country** should all reflect the cardholder's MSU campus address.
 - Note:** The initial cardholder address is extracted from the MSU employee 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.
 - The **Phone Number** field can be the cardholder's MSU phone number or their cell phone number.
 - The **MSU Email** field must be the cardholder's MSU email address.
- 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.

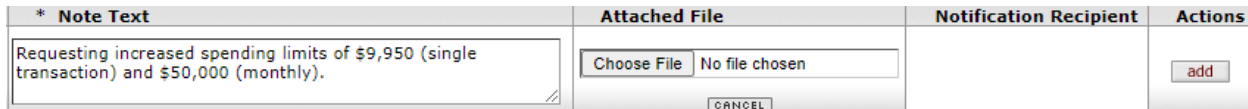


Purchase limits

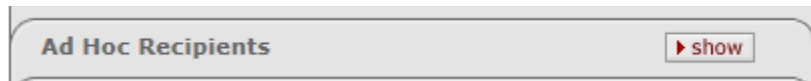
- On the second **MSU Cardholder Information** tab, update the **Monthly Spending Limit** field (right-hand column) to the desired amount of the two default options: \$25,000, with a \$5,000 single purchase limit or \$50,000, with a \$9,950 single purchase limit.
 - Note:** the PCard team will update the **Single Purchase Limit** field to the corresponding amount.



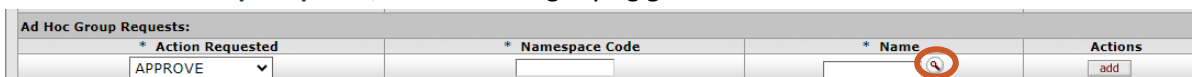
- Add a note to the **Notes and Attachments** tab indicating the requested PCard spending limit change.
 - If a non-default spending limit was approved via a PCard Exception Request form, include the approval email as an attachment.



- 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.
 - Expand the **Ad Hoc Recipients** tab of the eDoc.



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



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

Group Id:	
Group Namespace:	
Group Name:	*CGA*
Group Description:	
Type:	
Active?:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Principal Name:	
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

- 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.

Ad Hoc Group Requests:			
* Action Requested	* Namespace Code	* Name	Actions
APPROVE	KFS-SYS	CGA Processor I	<input type="button" value="add"/>

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 new spending limits will not take effect until the PCMD has routed, been fully approved, and the PCard team has updated the cardholder record with the bank. The cardholder will receive an automated FYI on the eDoc once the change is in effect.

<input type="button" value="submit"/>	<input type="button" value="save"/>	<input type="button" value="close"/>	<input type="button" value="cancel"/>
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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.

* Default Chart:	MS	<input type="button" value="magnifying glass"/>
* Default Account:		<input type="button" value="magnifying glass"/>
Default Account Name:		
Default Account Expiration:		
Fiscal Officer Principal Name:		
Backup Chart:	MS	<input type="button" value="magnifying glass"/>
Backup Account:		<input type="button" value="magnifying glass"/>

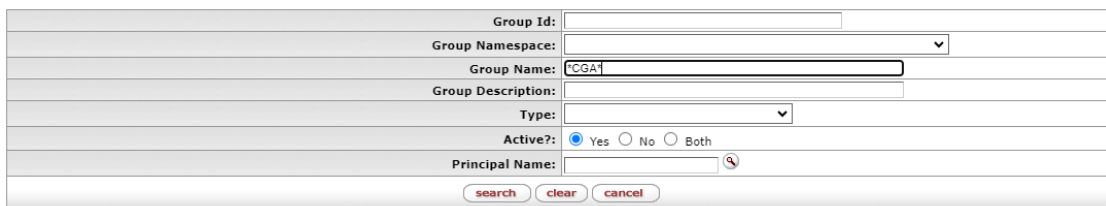
2. After the account number is populated, the account details will auto-populate in the **Default Account Name**, **Default Account Expiration** (if applicable), and **Fiscal Officer Principal Name** fields. Use these fields to ensure the correct account is being assigned to the PCard.
3. Follow the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

Ad Hoc Recipients	<input type="button" value="show"/>
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- b. Under **Ad Hoc Group Requests**, select the magnifying glass next to the **Name** field.

Ad Hoc Group Requests:			
* Action Requested	* Namespace Code	* Name	Actions
APPROVE		<input type="button" value="magnifying glass"/>	<input type="button" value="add"/>

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

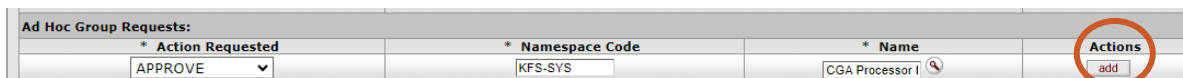


- d. Click **return value** for the appropriate CGA processor group for the account number.



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.



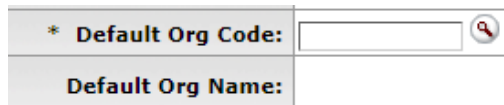
* Action Requested	* Namespace Code	* Name	Actions
APPROVE	KFS-SYS	CGA Processor I	add

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

- When a cardholder changes departments or organizations, their PCard can move with them.
- 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.



- 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.
- 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.
 - 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.

