



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 **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="button" value="▼"/>
<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 indicating the reason for cancellation or suspension of the PCard.

Document Overview [▼ hide](#)

Description: <input type="text"/>	Explanation: <input type="text"/>
Organization Document Number: <input type="text"/>	



Cancellation

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

The screenshot shows a dropdown menu for 'Card Status' with the following options: Active, Cancel, Pending Card. The 'Cancel' option is highlighted with a red circle.

2. The three fields immediately following Card Status also need to be completed:
 - a. **Card Cancel Reason:** 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:** 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:** Select the appropriate reason for the cancellation.
 - i. **Closed:** PCard is no longer needed.
 - ii. **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. For urgent requests such as a terminated employee, contact the PCard team at (517) 884-6080.
 - 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.

The screenshot shows the bottom of the form with four buttons: submit, save, close, cancel. The 'submit' button is highlighted with a red circle.

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**.

The screenshot shows a dropdown menu for 'Card Cancel Status' with the following options: Closed, Lost/Stolen, Reissue, Suspended, Terminated. The 'Suspended' option is highlighted with a red circle.

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.

The screenshot shows the bottom of the form with four buttons: submit, save, close, cancel. The 'submit' button is highlighted with a red circle.



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 above Closed.

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

Card Cancel Status:

Closed
Lost/Stolen
Reissue

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.

submit save close cancel