

Overview: The MSU Pcard allows the direct procurement of low-dollar purchases by faculty and staff through the use of a credit card. The intent of the program is to increase efficiency by eliminating the need for small dollar requisitions, disbursement vouchers (DVs), and petty cash funds. Pcard purchases result in quicker turnaround time, greater flexibility in ordering, and reduced paperwork. For more information on Pcard policies and procedures, see the [Manual of Business Procedures, Section 271](#) or the [MSU Purchasing website](#).

This guide will cover how to request new cards and how to request changes to existing cards. Pcard requests must meet the requirements of the Manual of Business Procedures.

If you have rush requests, card suspension or cancellation requests, please contact the Pcard team immediately. For changes in monthly spending limit, create and submit an eDoc in KFS and follow up by contacting the MSU Purchasing Pcard Team.

New Card Requests

Step 1: Login to ebs.msu.edu and click the Finance System tab

Step 2: Click the Procurement Card Maintenance link on the Main Menu.

Note: Pcard requests can be made by any active Finance System user. The request must be approved by the Pcardholder, default and backup (if applicable) account Fiscal Officer(s), ad hoc routed for approval to the Dean/Director/Chair of the default organization, and ad hoc routed for approval to Contracts and Grants based on the default account number. If the monthly spending limit is over \$5,000, the request must go to the Pcard Team before a Pcard is issued.

Step 3: From the Procurement Card Maintenance link you can look up existing Pcards or request a new Pcard. To request a new Pcard, click the “Create New” button.

Step 4: Complete the Description and Explanation fields.

Step 5: Enter or search and return the MSU NetID of the Pcardholder. Pcardholder name, address, phone, and email information is populated from the system. The default format of the phone number requires editing or it will cause an error when the eDoc is submitted. To prevent the error message, edit the phone number so that it is in a ten-digit format. Please note, Pcardholder address information cannot be restricted. In cases where this information must be suppressed, it is recommended to use an alternate campus address. It is important the Pcardholder use the alternate address information when corresponding with the bank, since the bank will only have the address information that is listed on this eDoc.

MSU Procurement Pcardholder Information Tab

MSU Procurement Cardholder Information ▼ hide	
New	
* Procurement Cardholder MSU NetID:	<input type="text"/>
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
* Transaction Cardholder Name (Lastname Firstname):	<input type="text"/>
* MSU Address Line 1:	<input type="text"/>
MSU Address Line 2:	<input type="text"/>
* City:	<input type="text"/>
* State:	<input type="text"/>
* Postal Code:	<input type="text"/>
* Country:	<input type="text"/>
* Phone Number:	<input type="text"/>
* MSU Email:	<input type="text"/>

Step 6: Complete the last four digits of the Pcardholder’s social security number, and their date of birth. These fields should be entered carefully. The bank relies on this information to verify the identity of the Pcardholder. This sensitive data is masked to everyone except the Pcardholder and the Pcard Administrators.

* Social Security Number (last four digits) (Secured Info):	<input type="text"/>
* Date of Birth (Secured Info):	<input type="text"/> 

MSU Procurement Card Information Tab

This tab contains information about the Pcard number, Organization code, account(s), spending limits, and Pcard status.

The Pcard Administrators will populate the Procurement Card Number and Expiration Date fields after the card is issued.

Enter or search for the Default Org Code that will be responsible for the card.

Complete the Default Account field. Once this field is populated, the Default Account Name, Default Account Expiration Date and Default Fiscal Officer name will populate.

If you are requesting a Pcard and the Default Account Number is not a general fund account, the system requires a backup general fund account that can be used in the event that the Default Account is expired or closed.

Complete the Monthly Spending Limit field. This field is subject to the requirements outlined in the Manual of Business Procedures, Section 271.

The Card Status defaults to “Pending Card.” The Pcard Administrators will edit this field when the card is issued.

New	
Procurement Card Number:	<input type="text"/>
Procurement Card Expiration Date:	07/31/2017
* Default Org Code:	<input type="text"/>
Default Org Name:	<input type="text"/>
* Default Chart:	MS <input type="button" value="↻"/>
* Default Account:	<input type="text"/>
Default Account Name:	<input type="text"/>
Default Account Expiration:	<input type="text"/>
Fiscal Officer Principal Name:	-
Backup Chart:	MS <input type="button" value="↻"/>
Backup Account:	<input type="text"/>
Default Object Code:	6559
* Monthly Spending Limit:	<input type="text"/>
Single Purchase Limit:	2,500.00
MCC Group 1:	<input type="text"/>
MCC Action 1:	<input type="text"/>
MCC Group 2:	<input type="text"/>
MCC Action 2:	<input type="text"/>
* Card Status:	Pending Card <input type="button" value="↕"/>
Card Cancel Reason:	<input type="text"/>
Cancel Effective Date:	<input type="text"/>
Card Cancel Status:	<input type="button" value="↕"/>

Notes and Attachments

In the Notes and Attachments tab there is a Notification Recipient field that allows for notice to be sent to active finance system users to read notes that are added to the eDoc. To use this functionality, simply add the note and/or attachment. Once you click the add button enter or search for the MSU NetID of the notification recipient and click the Send button. An Action List item will be sent to the Notification Recipient with the Action Requested status of Read Notes. This request is easily tracked through the Route Log tab.

Routing

The eDoc must be ad hoc routed for approval to a Dean, Director or Chair prior to the Pcard Administrator receiving the eDoc. Contracts and Grants should also receive an ad hoc for approval if the card limit is on a CGA account and the monthly spending limit is over \$5,000. The eDoc will automatically route to the Pcardholder and the Fiscal Officer(s) of the default account and backup account. Delegates are not recognized for the Fiscal Officer(s) in this maintenance document. Due to the approval of the validity of the transactions occurring in the finance system, the responsible Fiscal Officer's need to be aware of all cards that are assigned to their accounts. When the eDoc is in FINAL status, an FYI will be routed to the Pcardholder and default Fiscal Officer.

Editing Card Information

Pcardholder and/or Fiscal Officers should periodically review their Pcard data to ensure that the information in the system is accurate. The information in the system reflects the information held on file with the bank and may require editing. Only Pcardholders, default Fiscal Officers and the Pcard Administrators can view complete Pcard Maintenance data. If you have access to this information, the Pcardholder Name will be a clickable link that opens a view of the Pcard Maintenance file.

To edit card information, starting from the finance system, click the Procurement Card Maintenance link. Search for the card you would like to edit. Search options include Pcardholder MSU NetID, Pcard Number, Pcardholder First/Last Name, Default Account, Default Fiscal Officer, Default Organization Code, Backup Account Number and Card Status. You may search using any combination of these fields. Once you locate the card you would like to edit, click the "Edit" link to the left of the search results. The Pcard Maintenance eDoc will open with the old (current) information on the left and the new (editable) information listed on the right. Fields that can be changed/edited are indicated with editable text

boxes/editable drop-down lists. Reasons to edit a Pcard Maintenance eDoc include Pcardholder name, email, address or phone number change, change default account or backup account numbers, change monthly spending limits, and/or cancel (or suspend) a Pcard. All changes will be marked with a yellow asterisk in the fields and tabs that contain changes. Please note if you initiating a time sensitive (immediate) change such as changing monthly spending limits, canceling or suspending a card you should contact MSU Purchasing directly and follow up with changing the information in the finance system.

Please remember, requests made via the Pcard maintenance table will not be changed with the bank until the Pcard Administrators have approved the eDoc. The Pcardholder and default account Fiscal Officer will receive an FYI once the Pcard Administrators approve the eDoc for notification that the request was completed.

Complete the Description and Explanation fields.

MSU Procurement Pcardholder Information Tab

All of the information on this tab is editable with the exception of the secure information (social security number, date of birth and mother’s maiden name). The secure information is editable by the Pcardholder and the Pcard Administrators. Use this tab to update name and/or address information.

MSU Procurement Card Information Tab

This tab contains information about the Default Account, Default Organization Code, Backup Account Number, Monthly Spending Limits and card status. With the exception of card status all of these fields can be entered in the same way as when you request a new card (see above).

To cancel or suspend a Pcard, select the card status of “Cancel” from the drop-down list. You will then be required to complete the Card Cancel Reason, Cancel Effective Date and Card Cancel Status. Card Cancel Status is the reason for canceling the Pcard. Card Cancel Status choices are Closed, Lost/Stolen, Reissue, Suspended, and Terminated. Select the status that best describes the reason you are cancelling the card. Cancellation requests are routed to the default Fiscal Officer and the Pcard Administrators for approval. For urgent requests, contact the Pcard Administrators immediately.

Card Status:	Cancel
Card Cancel Reason:	
Cancel Effective Date:	
Card Cancel Status:	

Routing

When a card is edited, with the exception of changing the Card Status to Cancel, the eDoc will route to the Pcardholder, default Fiscal Officer and Pcard Administrators for approval.