

## Integrative Biology Pcards

MSU pcards may be requested for faculty & staff positions that need to make regular payments to external vendors with a credit card. IBIO Business Staff can assist Cardholders, but each Cardholder is responsible for ensuring their purchases align with all MSU procurement policies to avoid card suspension/ cancellation.

[MSU Pcard Manual](#)

[MSU Manual of Business Procedures, Section 271: Pcard](#)

### Quick Tips

- [Spartan Marketplace](#) is the most efficient route for ordering supplies and offers direct billing options, so try there before heading to external sources. Student employees can help with ordering using this route.
- Pcard Single Purchase Limit= \$5,000.00.
- Be sure [Tax Exemptions](#) are requested for all purchases.
- MSU Pcards are issued to individuals. Each cardholder is responsible for all purchases made on their card and should not allow others to use their card.
- Recommended to request educational discounts.
- Keep in mind unallowable pcard purchases include: most travel expenses, [IT expenses](#) (w/o pre-approval), facilities-type expenses, auction sites, wholesale memberships, and any additional prohibited items included within the PCard Manual.
- Delivery to the [IBIO Business Office](#) is recommended, please make sure to pick up your items and resolve any delivery issues with the vendor ASAP.
- Report any [lost or stolen pcards](#) ASAP.
- Follow all Pcard Policies to avoid the [1-2-3 Strike Policy](#) (pg15) that could result in card cancellation.

**Every Pcard eDoc must have corresponding itemized receipts, business purpose explanations, and account number confirmations uploaded into EBS before the route is finalized.**

Itemized receipts	Receipts must clearly show the vendor, what was purchased, the quantity of each item, how much each cost, total paid, and date of purchase. • Please format as an upward facing pdf.
Business purpose explanations	Business purpose explanations are required to justify each purchase made using MSU funding. Please make sure explanations are detailed and easily understood from an outside perspective. Think answering- who/what/where/when/why • The business purpose shouldn't just list what the item is, it should explain HOW & WHY the expenses supports MSU research/ business. • If charged to a grant account, be sure to include project relevance. Expenses must be within the project date, allowable under the award terms, and allocable to the project(s) paying. Try to avoid wording like "lab supply" as that can be interrupted as a general supply and not specific to the project paying.
Account number confirmations	Account number confirmations should be included in the notes section to allow auditors to verify the intended account receives the expense.

## Pcard eDoc Reconciliation

Pcard eDocs are automatically routed to the cardholder in EBS-KFS and grouped by bank posting date (keep an eye out for multiple transactions on a single eDoc). EDocs can be accessed via the automated email option or through their EBS Action List: Finance tile. Multi-Factor Authentication is needed for login. **Pcard eDocs must be reviewed, updated, and approved by the cardholder as soon as possible.** It is recommended to place a weekly reminder on your calendar to review your KFS action list.

- To Update the **Accounting Line**: type the Account# and Sub-Account into each field then select the refresh button under the Actions column to the right.

Accounting Lines										Import Lines
	* Chart	* Account	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions	
add:	MS							0.00		
MICHIGAN STATE UNIVERSITY										
Line Description										
									add	
1	MS	GA013551		6559				135.67		
MICHIGAN STATE UNIVERSITY										
Integrative Biology - NS OPERATING - GEN Operations - INTEGRATIVE BIOLOGY										
Line Description										
PROCUREMENT CARD										
									add refresh	

Charges can be split across multiple accounts by inputting an additional accounting string in the line above and selecting the add button under the Actions column. All lines need to add up to the original total and split reasoning explained.

- To Upload the **Itemized Receipt, Business Purpose Explanation & Account# Confirmation**: expand the Notes and Attachments tab near the bottom of the eDoc by selecting the >show button.
  - Within the Note Text field, type in the business purpose explanation & account number confirmation
  - Under the Attached File column, browse to locate where you have saved the receipt, select, and upload.
  - Select the add button under the Actions column to the right.

Modify Capital Assets ▶ show

General Ledger Pending Entries ▶ show

Notes and Attachments (0) ▶ hide

**Notes and Attachments**

	Posted Timestamp	Author	* Note Text	Attached File	Attachment Type	Notification Recipient	Actions
add:			Amazon- pulse seachem solution to be used for maintaining aquaria as part of the animal husbandry of Dr. XXXX's NSF RCXXXXXX research project	Choose File Amazon Receipt.pdf			add

Ad Hoc Recipients ▶ show

Route Log ▶ show

send ad hoc request save reload approve close

- Repeat for any additional transaction line.
- Save and review the eDoc. Once all documentation is included, select the approve button at bottom of eDoc so that it can continue through the approval routing.