

PORTAL4PCARD INSTRUCTIONS: UPDATE EXISTING/FRAUD INSTRUCTIONS

Update Existing/Fraud Account Instructions.

What you will need to begin:

- UO ID/95 Numbers for **each** role/user associated with your account*
- PCard training date(s) for **each** role/user**

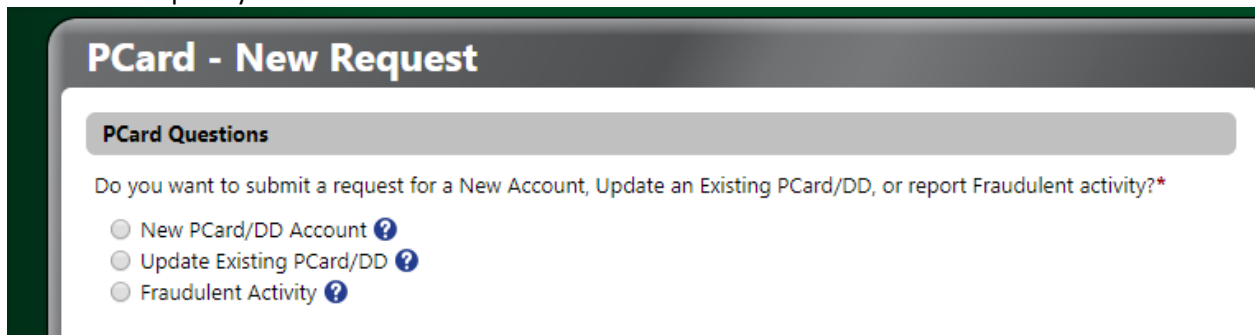
*Please note that the system is designed to remember people's UO ID/95 numbers and training date; you will only need to enter this information once, and some people's information is already in the system.

**If a user/role does not have a PCard training date, they will need to 1. Take the PCard training via MyTrack, or 2. Contact PCS to verify their training date (if training took place prior to MyTrack). If verifying a training date with PCS, please include any names the person previously used.

- Current card information; having the PCard available will help

Let's get started!!

1. Go to the PCS Portal Home at <https://apps.ideal-logic.com/uopcs>, or by going to pcs.uoregon.edu.
2. Click on **Create Intake Form**
 - a. Select **PCard/DD**, Create Form
3. Select the Request you want:



PCard - New Request

PCard Questions

Do you want to submit a request for a New Account, Update an Existing PCard/DD, or report Fraudulent activity?*

- New PCard/DD Account ?
- Update Existing PCard/DD ?
- Fraudulent Activity ?

*Below are instructions for Updating Existing PCard/DD or Fraudulent Activity. See **New Account Instructions** for New PCard/DD Account.*

- Update Existing PCard/DD*
- Fraudulent Activity*

By selecting **Update Existing or Fraud**, you will then need to select the card you are addressing; search by last 4 digits, card custodian, etc. There are many ways to search.

* You will need to search for the individual card



Select a PCard/DD

Click the *Select* button next to your choice

Search... Type... Card Custodi Budget Authc More Filters...

PORTAL4PCARD INSTRUCTIONS: UPDATE EXISTING/FRAUD INSTRUCTIONS

Once you have selected your PCard, the Account Information will pop up. Please review for accuracies, as you may need to update information beyond what you originally intended. For instance, you may have active users you thought were already removed from your account, etc.

Account Information Open Current... ?

Account ID 212095	Index [REDACTED]	Card # [REDACTED]	Duck Depot No
Name On Card SERVICES FACILI	3rd Level Department [REDACTED] Mgmt - 450000	5th Level Department [REDACTED] Services - 450005	Address None

People

Card Custodian [REDACTED] Training Date: Apr 27, 2000	Budget Authority [REDACTED] Training Date: Oct 15, 2018	Card Users [REDACTED] Training Date: Jul 11, 2008
Backup Card Custodians None	Budget Authority Designee None	

Financial

Monthly Credit Limit
Empty

Single Transaction Limit
Empty

The **Financial** section is likely to be *empty*, unless changes have been recent, and in some cases, was pulled data from our previous database. This section will be tracked and updated as changes occur with your account.

Training Dates will be updated as they are entered into the system. If someone has not been updated recently, they will likely not have a training date next to their name. However, once a training date is entered, the system will remember it for further uses.

- The answer to the next question should be “No” unless PCS is specifically working with you on a unique situation and has instructed you to select “Yes.”

If you are already working with PCS on your request please select "Yes". Otherwise, you will need to select "No" and move forward with the form.*

Yes No

Selecting NO will open your options to **Updates to PCard**:

Updates to PCard*

Please select from the following options for actions you would like to take for the selected PCard.

- Add Role ?
- Delete Role ?
- Update PCard Account
- Other Requests

PORTAL4PCARD INSTRUCTIONS: UPDATE EXISTING/FRAUD INSTRUCTIONS

Each selection opens more options based on the current roles with your account:

Updates to PCard*

Please select from the following options for actions you would like to take for the selected PCard.

- Add Role [?](#)
 - Change Card Custodian [?](#)
 - Change Budget Authority [?](#)
 - Add Backup Card Custodian
 - Add Budget Authority Designee
 - Add Card User
- Delete Role [?](#)
 - Delete Card User
- Update PCard Account
 - Change In Index
 - Change Address
 - Change in Monthly Credit Limit
 - Change in Single Transaction Limit
 - Cancel PCard
- Other Requests

Please provide detailed information in regard to your request.

5. **Fraud** situations will be instructed to contact US Bank. If you *have* contacted US Bank, answer yes to the next question and enter the appropriate information. If you have *not* contacted US Bank, you will not be able to submit a fraud matter until you have reported the fraud to US Bank.

After certifying your Code of Ethics, click **Submit Intake Form**. An email will be sent to the selected contacts for the matter with the system's matter number. Using your matter number, you can check back for updates by logging into the portal at any time.

What happens next?

The system will first email the Card Custodian to approve the matter; once approved, the Budget Authority will be emailed to approve the matter. The matter will then go to PCS for approval and intake will receive the matter to be worked on.

PCS will contact you via the portal for any questions, and/or notifications. Matter Contacts and Card Custodian/Budget Authority will be notified by email once all actions are executed.

PORTAL4PCARD INSTRUCTIONS: NEW PCard/DD INSTRUCTIONS

New Account Instructions.

What you will need to begin:

- UO ID/95 Numbers for **each** role/user associated with your account*
- PCard training date(s) for **each** role/user**

*Please note that the system is designed to remember people's UO ID/95 numbers and training date; you will only need to enter this information once, and some people's information is already in the system.

**If a user/role does not have a PCard training date, they will need to 1. Take the PCard training via MyTrack, or 2. Contact PCS to verify their training date (if training took place prior to MyTrack). If verifying a training date with PCS, please include any names the person previously used.

- Current department information
 - 3rd/5th levels for the index your department is assigned
 - Valid index
 - Department mailing address
 - Name you want on the face of the credit card
- Credit limit amount(s)

To get started...

1. Go to the PCS Portal Home at <https://apps.ideal-logic.com/uopcs>, or by going to pcs.uoregon.edu.
2. Click on **Create Intake Form**
 - Select **PCard/DD**, Create Form
3. Select New PCard/DD Account

The screenshot shows a web interface titled "PCard - New Request". Below the title is a section labeled "PCard Questions" with a question: "Do you want to submit a request for a New Account, Update an Existing PCard/DD, or report Fraudulent activity?*" There are three radio button options: "New PCard/DD Account", "Update Existing PCard/DD", and "Fraudulent Activity". Each option has a small question mark icon next to it.

- New PCard/DD Account
 - i. Is this for a Duck Depot Account?
 - ii. Yes/No takes you to identifying the 3rd/5th levels, which you **must change** to match your department's correct levels
4. Enter a valid index for this account
 5. Enter the Name you want on the face of the credit card (some names will be abbreviated and/or shortened due to US Bank guidelines)
 6. Enter the **department** UO address where mail is sent
 7. Select the Card Custodian for this account
 - You will need the 95# and PCard training date, email/phone will be needed if the person's information is not already known in the portal system

PORTAL4PCARD INSTRUCTIONS: NEW PCARD/DD INSTRUCTIONS

Card Custodian*
Please select a Card Custodian.

Isla Dane [Remove](#)

[Select a Person](#)

Isla Dane

UO ID Number* **Training Date ?**
Enter Isla's UO ID Number.

Email Address **Phone Numbers**
isla@uoregon.edu (123) 456-7890 (Office) [Edit](#) | [Remove](#)

[Add Phone Number](#)

8. Enter additional users/roles, as applies to your new account. At a minimum, a Card Custodian and Budget Authority must be selected, including their 95# and PCard training date.

Please note that the system is designed to remember people's UO ID/95 numbers and training date; you will only need to enter this information once, and some people's information is already in the system.

If a user/role does not have a PCard training date, they will need to 1. Take the PCard training via MyTrack, or 2. Contact PCS to verify their training date (if training took place prior to MyTrack). If verifying a training date with PCS, please include any names the person previously used.

9. Credit Limits are defaulted to \$5,000 for regular PCards, \$25,000 for Duck Depot accounts. If you need a higher dollar amount, enter the new limit(s) in the applicable section.

Monthly Credit Limit*
Please enter the monthly credit limit requested.

\$

Single Transaction Limit*
Please enter the new single transaction limit you would like to request and whether this is a temporary or permanent change. **Note:** This amount must be less than the monthly credit limit.

\$

After certifying your Code of Ethics, click **Submit Intake Form**. An email will be sent to the selected contacts for the matter with the system's matter number. Using your matter number, you can check back for updates by logging into the portal at any time.

What happens next?

The system will first email the Card Custodian to approve the matter; once approved, the Budget Authority will be emailed to approve the matter. The matter will then go to PCS for approval and PCS intake will receive the matter to be worked on.

PCS will contact you via the portal for any questions, and/or notifications. Matter Contacts and Card Custodian/Budget Authority will be notified by email once all actions are executed.