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:

   - Update Existing PCard/DD*
   - Fraudulent Activity*

* You will need to search for the individual card

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.
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.

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.

4. 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:
PORTAL4PCARD INSTRUCTIONS: UPDATE EXISTING/FRAUD INSTRUCTIONS

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

- 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.
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

   - 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
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.

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.