In This Guide

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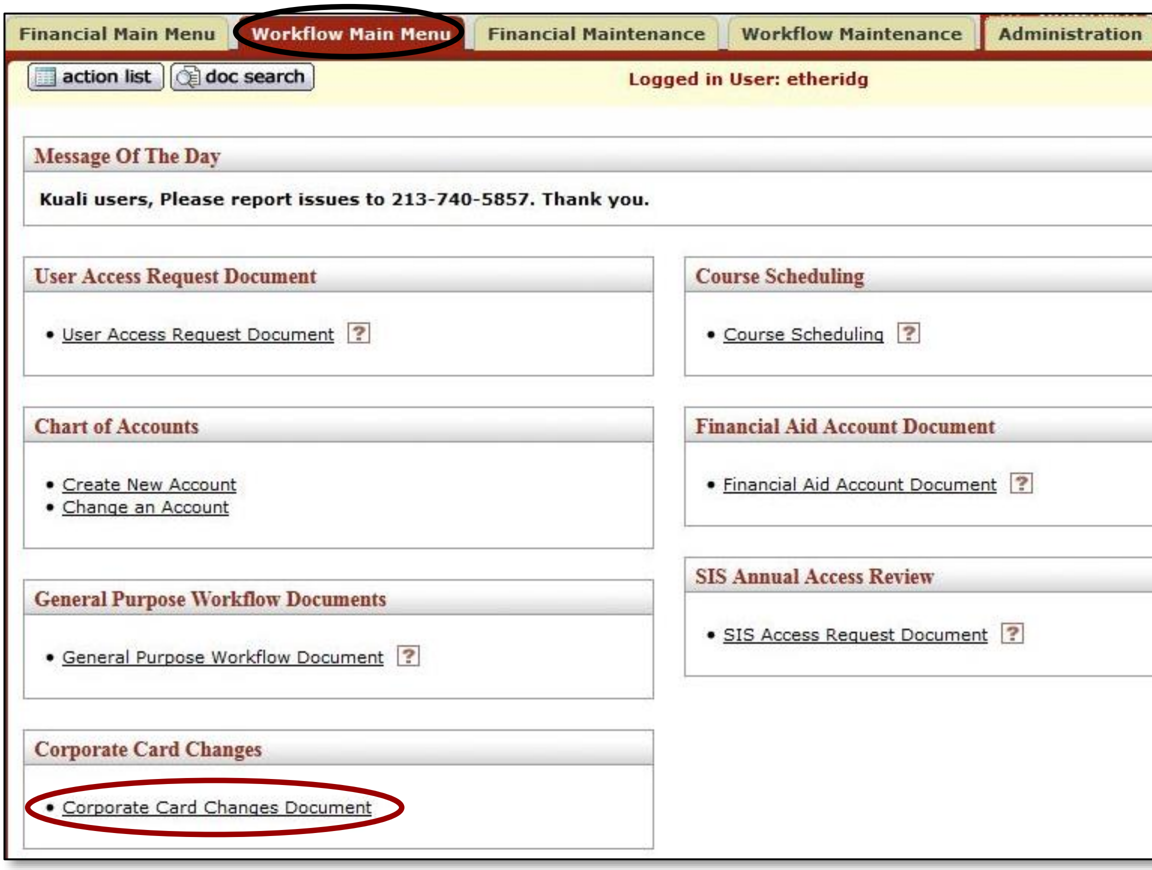
This guide demonstrates how to access, complete and submit the Corporate Card Changes eDoc in KFS. Any USC staff member can use this process to request changes to the following types of cards:

- Procurement Cards (P-Card);
- Travel Cards; and
- Controlled Value Cards (CV Card).

Accessing the Corporate Card Changes eDoc

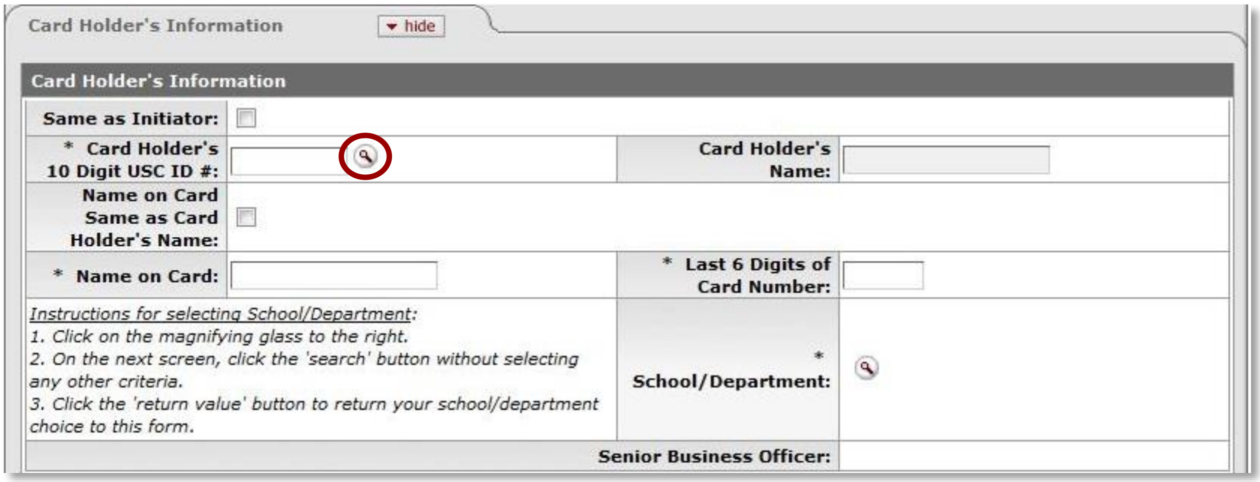
1. Click on the **Corporate Card Changes Document** (CCC) link in the **Workflow Main Menu**.



2. In the **Document Overview** tab, enter a **Description**.
3. In the **Card Holder's Information** tab, select **Same as Initiator** if the cardholder is submitting the eDoc to prepopulate the fields with the cardholder's information.
4. Select **Name on Card Same as Card Holder's Name**, if applicable.

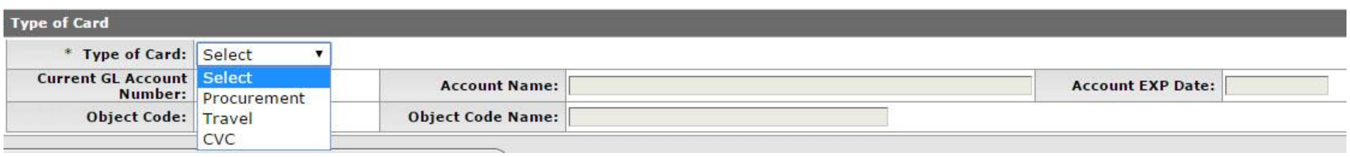
5. Complete the required fields:
   - Card Holder's 10 Digit USC ID #
   - Name on Card
   - Last 6 Digits of Card Number
   - School/Department

   Use the **lookup icon** to populate the cardholder's 10-digit ID number and school or department.



6. In the **Type of Card** tab, select the appropriate **Type of Card**.

Note: Travel cards do not require the remaining fields.

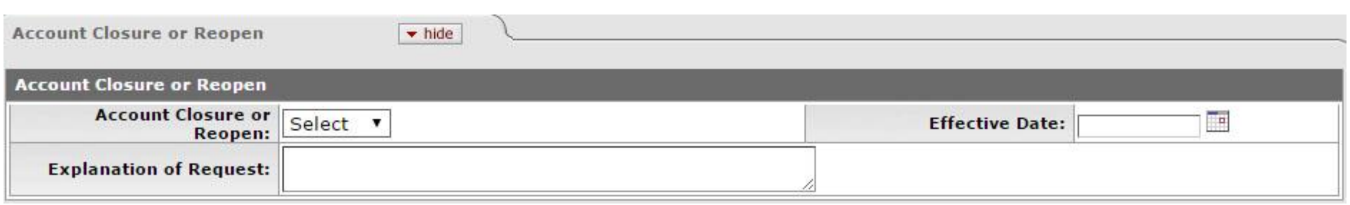


Making changes

The following changes can be made to corporate cards by accessing the appropriate tab.

In the **Account Closure or Reopen** tab:

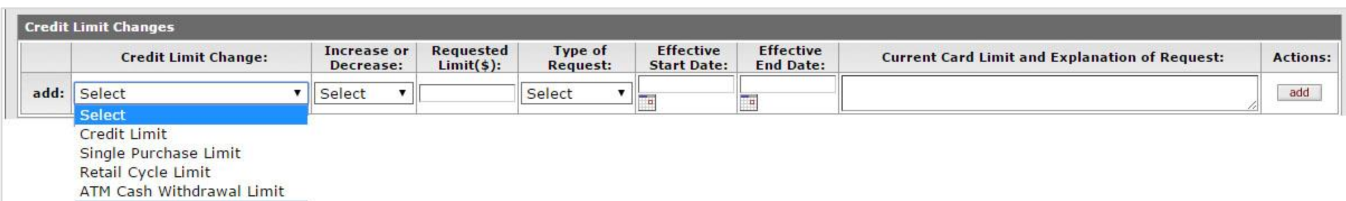
1. Select the appropriate action from the **Account Closure or Reopen** drop-down.
2. Click on the **calendar icon** to select the **Effective Date**.
3. Provide a brief **Explanation of Request**.



Note: Account closure requests cannot be combined with any other changes.

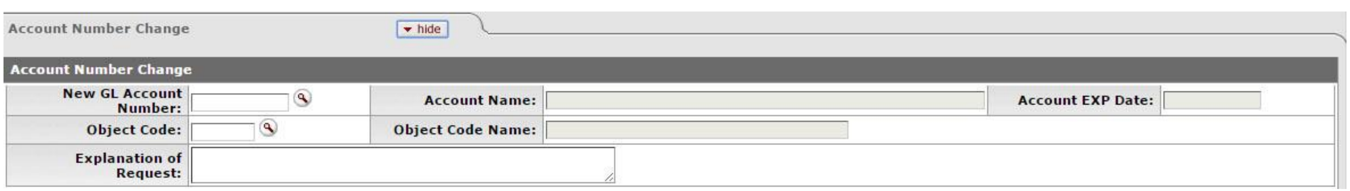
In the **Credit Limit Changes** tab:

1. Select the appropriate action from the **Credit Limit Change** drop-down:
    - Credit Limit (all corporate cards)
    - Single Purchase Limit (P-Cards and CV Cards)
    - Retail Cycle Limit (travel cards)
    - ATM Cash Withdrawal Limit (travel cards)
2. Indicate whether the request is for an **Increase or Decrease**, the **Requested Limit ($)**, and whether the **Type of Request** is permanent or temporary.
3. Click on the **calendar icons** to select the **Effective Start Date** (required for all requests) and **Effective End Date** (required for temporary requests).
4. Enter the current card limit in the **Current Card Limit and Explanation of Request** field, along with a brief explanation of the change request.
5. Click the **add** button in the **Actions** column.
6. Repeat steps 1-4 to add additional credit limit changes.



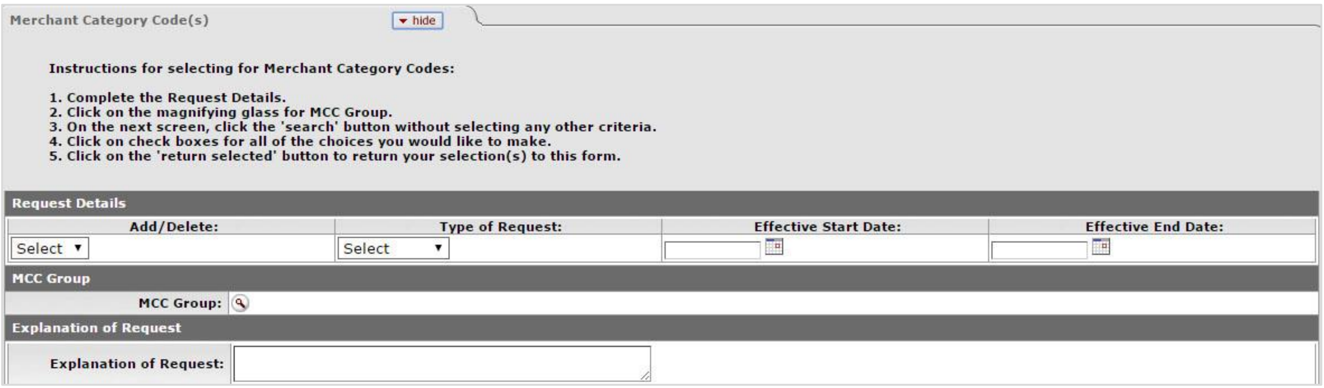
In the **Account Number Change** tab:

1. Click the **lookup icons** to search for the **New GL Account Number** and **Object Code** fields.
2. Provide a brief **Explanation of Request**.



In the **Merchant Category Code(s)** tab:

1. Indicate whether the request is to **Add/Delete** and whether the **Type of Request** is permanent or temporary.
2. Click on the **calendar icons** to select the **Effective Start Date** (required for all requests) and **Effective End Date** (required for temporary requests).
3. Click the **lookup icon** to search for the desired **MCC Group**.
4. Provide a brief **Explanation of Request**.



If additional information related to the change(s) is required, include it in the **Notes and Attachments** tab.

After completing all the necessary tabs, click the **submit** button to submit the eDoc into the workflow.