Job Aid: How to use PCMS

How to use PCMS

You must be a cardholder, reviewer or updater to have access to the Purchasing Card Management System (PCMS) and you must be logged into the Central Authentication Service. The PCMS website is: pcard.umd.edu

Cardholders

- On the PCMS homepage, click on **Reallocate Charges** link located on the left side of page
- Select the appropriate billing period at the top and click **Process Card** for your active card. If you have had a lost/stolen/fraudulent card replacement, please check the Cancelled US Bank Card to make sure there are no outstanding logs
- Fill in the correct KFS account numbers and object codes
- Enter a description for each transaction in the field directly under the merchant name
- If you need to split a charge, click on the arrow in the Split column
  - o You will then input the KFS account #s, object codes and amounts for each account
  - o Click Update when you are finished inputting all the information
- After you have reallocated, make sure you Save the page before moving to another page
- If you would like to leave a note for your reviewer, select "View Transaction Log" at the top or bottom of the page and enter your note in the Note section at the bottom of the transaction log page and save

Reviewers

- Click on **Reviewer Menu** located on the left side of the page
- Select the billing period Select the cardholder(s) you are reviewing
- Review to make sure all transactions and documentation have met the criteria under the UMD policy
- Leave any notes if necessary
- Click on **Reviewer Signoff – Transaction Log Reviewed**

Updaters

- Click on **Reallocate Charges**
- Select the appropriate billing period at the top and click Process Card for the active card. If there is a lost/stolen/fraudulent card replacement, please check the Cancelled US Bank Card to make sure there are no outstanding logs
- Fill in the correct KFS account numbers and object codes
- Enter a description for each transaction in the field directly under the merchant name
- If you need to split a charge, click on the arrow in the Split column
  - o You will then input the KFS account #s, object codes and amounts for each account
  - o Click Update when you are finished inputting all the information
- After you have reallocated, make sure you Save the page before moving to another page
- If you would like to leave a note for your reviewer, select **View Transaction Log** at the top or bottom of the page and enter your note in the Note section at the bottom of the transaction log page and save