PROCUREMENT CARD PROCESSES (Note: Red text indicates what agencies they are applicable for)



New Procard Application Process (applicable to non-self-administering agencies)



Employee

- Get application form from MINE/SPB Website
- Fill out application form
- Obtain supervisor signature/accounting information
- Send to Agency Coordinator for submittal

Agency Coordinator

· Ensure application form is completed correctly (verify supervisor signature and accounting info)

Agency Coordinator

 Submit application form by email to pcarduspport@mt.gov

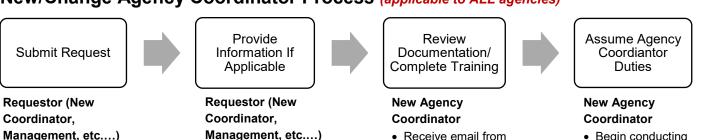
Employee

- · Receive email from pcardsupport@mt.gov
- · Review referenced documentation
- Follow training instructions if applicable

Employee

· Receive physical Procard from Agency Coordinator

New/Change Agency Coordinator Process (applicable to ALL agencies)



Management, etc....) · Send email to pcardsupport@mt.gov stating if this is replacement or backup. If new, send who the new agency coordinator will be (name, C number, and email) and who the

previous coordinator

was

· Be aware State Procurement Bureau may contact you with questions

- · Receive email from pcardsupport@mt.gov
- Review reference documentation
- Follow training instructions if applicable

· Begin conducting business as Agency Coordinator

Updated: 4/18/2019

Address Change Process

(applicable to non-self-administering agencies)

Submit Request



Make Address Change

Agency Coordinator

 Send email to <u>pcardsupport@mt.gov</u> stating employee name, employee ID, and email address, as well as the new address

Procard Support

- Will make change to designated employee's address
- Will notify agency coordinator and cardholder when complete

Limit Change Process

(applicable to non-self-administering agencies)

Submit Request



Make Limit Change

Agency Coordinator

 Send email to pcardsupport@mt.gov stating employee name, employee ID, and email address, as well as the limit change requested

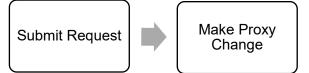
Procard Support

- Will make change to designated employee's Procard limit
- Will notify agency coordinator and cardholder when complete

Updated: 4/18/2019

Proxy Change Process

(applicable to non-self-administering agencies)



Agency Coordinator

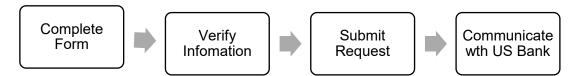
 Send email to pcardsupport@mt.gov stating employee name, employee ID, and email address, as well as-the proxy change requested

Procard Support

- Will make change to designated employee's Procard proxy
- Will notify agency coordinator when complete

Name Change Process

(applicable to ALL agencies)



Employee

- Get name change form from SPB website
- Fill out form
- Send to Agency Coordinator for submittal

Agency Coordinator

- Verify with HR or other resource for official confirmation of name change request
- Review and sign form

Agency Coordinator

 Send email to <u>pcardsupport@mt.gov</u> with name change form attached

Procard Support

- Send request to US Bank
- Will notify agency coordinator and cardholder when complete