



SUNY
DOWNSTATE
Health Sciences University

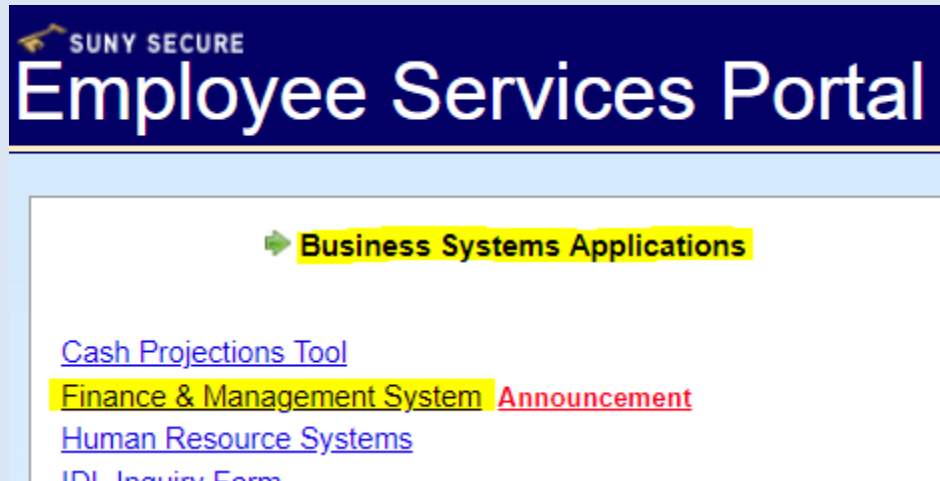
PCard (Procurement Card)

Default Account change procedure

Presented by:
Department of Finance

Changing PCard Default Account

- ❖ Job Aid on logging into the SUNY Employee Services Portal:
<http://connect.downstate.edu/bi-login/>
Also see “How to Access the SUNY Portal” slide below – slide 7.
- ❖ Select the Finance & Management System link on the Business Systems Applications tab:



- ❖ Select Finance from the pull-down menu, then under the Procurement Card section click on Cardholder Statement

Welcome: ██████ Campus: 28100

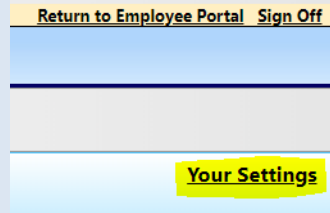
SUNY SECURE **SUNY Financials**

Workflow **Finance** Human Resources HR Home

Procurement	Accounts Payable
Item Requisition	Standard Voucher
Misc Requisition	Employee Reimbursement
Item Purchase Order	Refund Voucher
Misc Purchase Order	Workflow
SUNY Contract	Manage Approval Trees
Batch Printing	Procurement Card
Accounting Journals	Department Maintenance
Expenditure Journal	Cardholder Maintenance
Revenue Journal	Cardholder Statement
Allocation Journal	Campus Statements
Receiving	
Receiving Process	



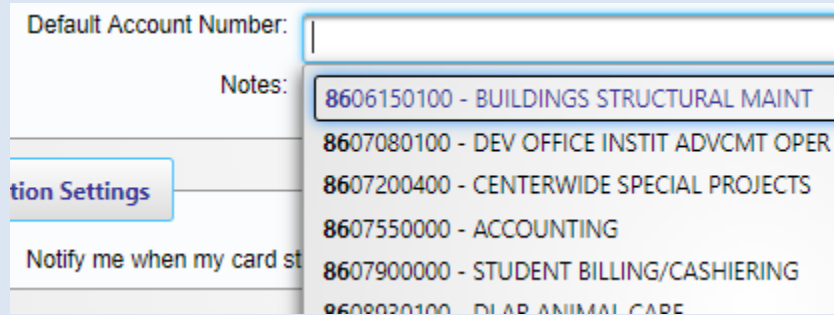
- ❖ Next, in the upper right-hand corner of the screen, click on “Your Settings”



- ❖ On the cardholder settings page, update Default Account Number

A screenshot of the 'Your Settings' page for a SUNY Financials P-Card. The page is divided into several sections: 'Welcome', 'Login Information', 'General Settings', 'Cardholder Settings', and 'Notification Settings'. The 'Cardholder Settings' section is highlighted with a light blue background and contains a note: 'NOTE: If any of the below contact information is incorrect, please contact your Program Administrator.' Below the note are fields for 'Cardholder Name', 'Phone Number', 'Card Number', 'E-mail Address', and 'Default Account Number'. The 'Default Account Number' field is highlighted in yellow. At the bottom of the page, there are two buttons: 'Save' and 'Return to Home'.

- ❖ To update, start typing the desired Account – the cardholder must have access to this Account – the available Accounts will appear – select the correct Account from the pop up menu by clicking on it.



The screenshot shows a web form with the following elements:

- A text input field labeled "Default Account Number:" with a dropdown arrow on the right.
- A "Notes:" label positioned above a list of account options.
- A list of account options, each consisting of a 10-digit account number followed by a description:
 - 8606150100 - BUILDINGS STRUCTURAL MAINT
 - 8607080100 - DEV OFFICE INSTIT ADVCMT OPER
 - 8607200400 - CENTERWIDE SPECIAL PROJECTS
 - 8607550000 - ACCOUNTING
 - 8607900000 - STUDENT BILLING/CASHIERING
 - 8608000100 - DIAB ANIMAL CARE
- A "tion Settings" button (partially visible) to the left of the account list.
- A checkbox labeled "Notify me when my card st" (partially visible) below the account list.

- ❖ If the desired Account does not appear, please contact Card Services – see last slide for contact information.
- ❖ Once the new default Account is populated in the Default Account Number field, click on Save, then click on Return to Home to return to the Statement View page.

Required monthly submission package reminder

On the 10th of the month following statement cycle end date, submission of a complete, approved package is due.

Package contents, check list, in this order:

- Certification Page, signed and dated by both Cardholder and Cardholder's Supervisor
- Citibank Statement
- Purchase requisition, approved and dated prior to the purchase of the item, with all applicable required documents, such as quote, invoice, proof of receipt
- Requisitions with support must be ordered to match the order that the transactions appear on the Citibank Statement

Packages must be scanned and emailed to

PCardMonthlyCertification@downstate.edu with the subject line formatted:

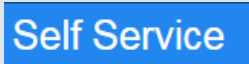

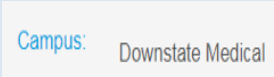

"PCard", [Cardholder Name], Statement Cycle Dates

Example subject line: PCard, John Smith, 7/7/19-8/6/19

How to Access the SUNY Portal

Before opening a browser, please note that SUNY recommends the Firefox browser, but Chrome also works. Please **DO NOT** use Internet Explorer to access BI as it does not work well with the program.



- Open the Firefox or Chrome browser and navigate to: <http://downstate.edu>
- Click the Self Service menu option. 
- Click the SUNY Secure Login button. 
- If prompted, select Downstate Medical Campus, and login. 
- Enter NetID (username and password used to access computers). 

A screenshot of the Downstate NetID Web Login page. It features a blue header with the 'DOWNSTATE NetID' logo. Below the header, the text 'Web Login' is displayed. There are two input fields: 'Username:' and 'Password:'. The 'Username:' field is currently empty, and the 'Password:' field is also empty.

For detailed information, access the Job Aid at:
<http://connect.downstate.edu/bi-login/>

Contact Information

DIANE DESOUZA
PROCUREMENT CARD / TRAVEL CARD
ADMINISTRATOR
EXT. 2799

OMOLARA JONES
PROCUREMENT CARD / TRAVEL CARD
COORDINATOR
EXT. 3056

System issues: Robert Robinson, ext. 2540
Budget issues: Sergio Maffettone, ext. 2790
IT/Hardware Issues: Help Desk, ext. 4357