PEOPLESOFT FINANCE ELECTRONIC FORMS

SPCC Cardholder Training Guide

Cash and Investments Office
Contact: appa@jmu.edu

Contents

Overview

Beginning August 1, 2021, the following forms for the Small Purchase Charge Card (SPCC) will be moved from paper or email format to electronic format within the PeopleSoft Finance System. All cardholders are expected, on this date, to use these forms for the following requests:

- SPCC New Cardholder Applications
- Managing SPCC Reconcilers
- Cancel SPCC
- Monthly Credit Limit Increases
- Single Transaction Increases
- Exception Requests

All forms will be electronically routed to your supervisor for approval then to the Cash and Investments Office or Accounting Technology for final approval and processing.   All active cardholders will have access to PeopleSoft Finance to initiate these forms. Supervisors, who have access to PeopleSoft Finance, will be able to approve them within the system; those without access will have the approvals on their MyMadison dashboard. For each request, a cardholder will receive confirmation emails that should be printed and kept with their SPCC records for audit purposes.

Form Location-PeopleSoft Finance

PeopleSoft Finance can be reached from the Quick Login Access page on the JMU website: [James Madison University - Quick Login Access (jmu.edu)](https://jmu.edu) . In the green shaded box, you will see Finance listed first. Click on this link.
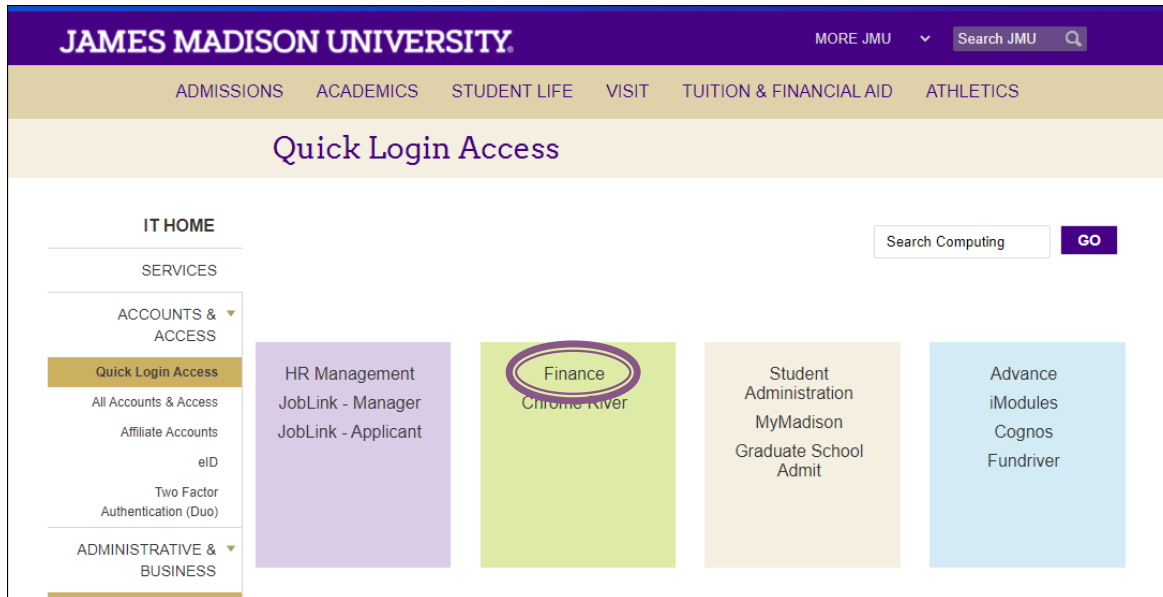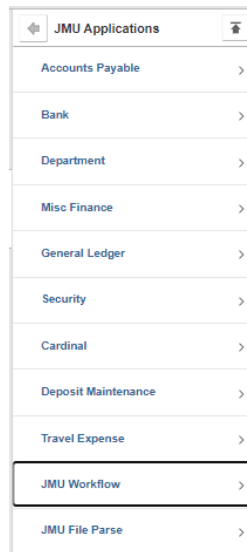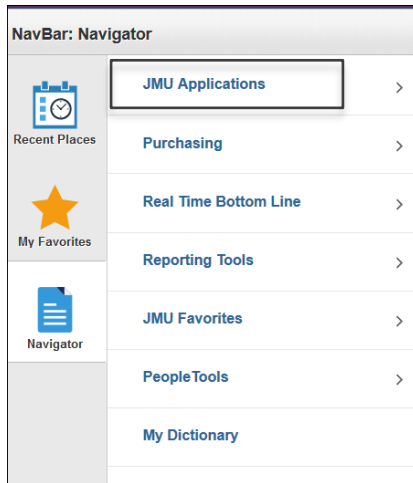

This will take you to the PeopleSoft Finance login page. You will use your e-id and password to log into this system. System access does require Duo authentication.
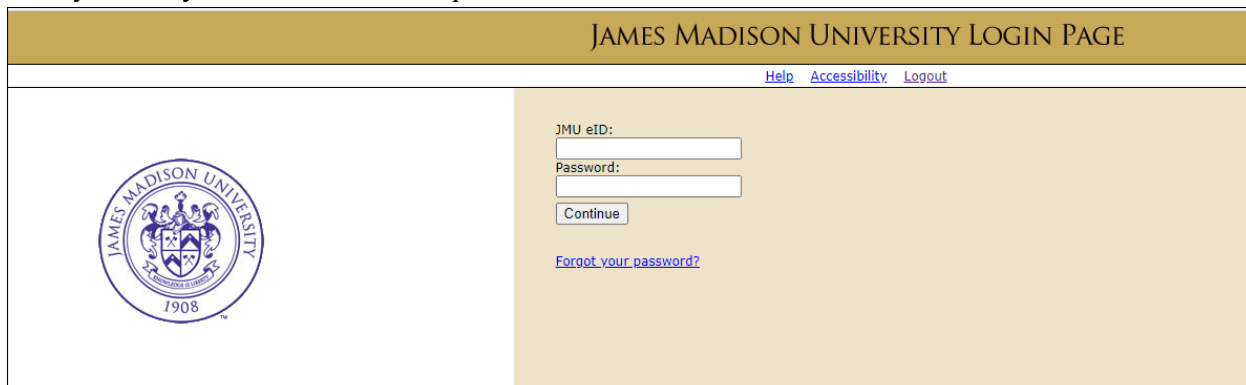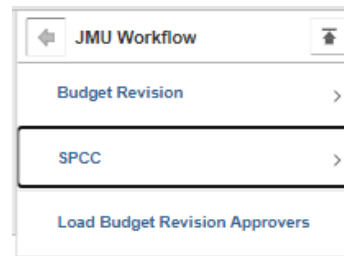

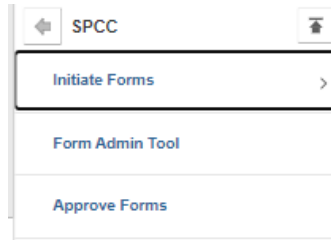1. You will click on the navigation button in the upper right corner.

2. Choose JMU Applications, then JMU Workflow

3. Choose SPCC from the JMU Workflow menu

4. Choose Initiate Forms from the SPCC menu

5. From the Initiate Forms Menu these options are available:

SPCC Application
This form is to be used by any JMU Faculty, Classified or Wage Staff member who needs to request a Small Purchase Charge Card (SPCC).

Manage Reconcilers
This form is to be used by any current SPCC cardholder who needs to add or delete employees to reconcile their transactions in the Bank of America WORKS system

Cancel SPCC
This form is to be used by cardholders or their supervisors to cancel a current SPCC. Reasons to cancel a card include when an employee leaves employment with the university or changes positions.
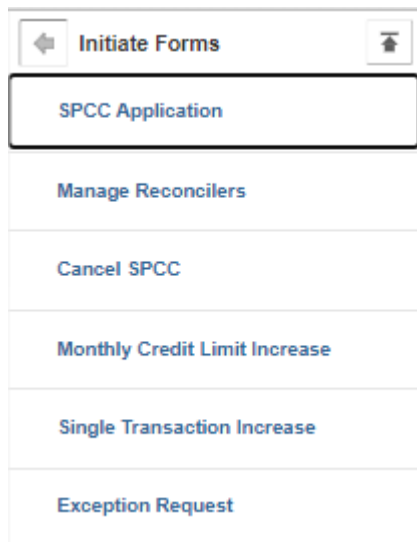
Monthly Credit Limit Increases
This form is to be used by cardholders to request increases to their overall monthly credit limit on their SPCC either temporarily or permanently.

Single Transaction Increases

This form is to be used by cardholders to request increases to their single transaction credit limit on their SPCC either temporarily or permanently. Increases over $10,000 must include a copy of the invoice and eVA EP/PCO or Procurement written approval.

Exception Requests

This form is used by cardholders to request any exception to a Merchant Category Code (MCC) restriction on the SPCC. These restrictions can include the restaurant block or accommodation block.

To begin initiation of a form, you will click on the appropriate form name and fill out the requested information.

Form Examples

SPCC Application

This form is to be used by any JMU Faculty, Classified or Wage Staff member who needs to request a Small Purchase Charge Card (SPCC). The following fields will be automatically filled in based on your e-id and password:

> *Applicant's Eid*
> *HR/Employee ID#*
> *Application's Name*
> *Date of Birth*
> *JMU Email Address*

The new cardholder must fill in the following information:

> *Student? This is either Yes or No. If you are a student, you are not eligible for an SPCC.*
> *JMU Physical Address: This is your JMU office address*
> *JMU Phone Number: This is your JMU office phone number*
> *Applicant's MSC: This is your departmental MSC*

Default Deptid: This is your departmental ID (org) number
Supervisor's Name: This is your supervisor's name
Supervisor's Email: This is your supervisor's JMU email address
Transaction Limit: This is the single transaction limit on your card. (typically $10,000)
Monthly Limit: This is your overall monthly credit limit. (typically between $10,000-$100,000)
Reconciler(s) for Card: These employees can reconcile your charges in the PeopleSoft Finance System. List their e-ids. **If you want to reconcile your own card, you must list yourself as well.**

SPCC Application

Complete the form below to apply for a James Madison University Small Purchase Charge Card. The employee applying for the SPCC must complete and submit this application themselves. Once the form is submitted, the application will be routed to your Supervisor for approval.

Applicant's Eid:	DICKENCM
HR/Employee ID#:	███████
Applicant's Name:	Dickens,Caroline Michelle
Date of Birth:	02/06/1986
Student?:	Yes
JMU Email Address:	hrtest@jmu.edu
JMU Physical Address:	1 DUKE DOG AVENUE
	Include Street, City, State, and Zip code
JMU Phone #:	540/568-1111
	Include area code
Applicant's MSC:	1111
Default Deptid:	100999
Supervisor's Name:	Catherine Weaver
Supervisor's Email:	weavercb@jmu.edu
Transaction Limit:	$10,000.00
Monthly Limit:	$25,000.00
Reconciler(s) for Card:	James Madison, (madisojx); Thomas Jefferson, jeffetxx
	Include the First / Last Name and Eid of all reconciler(s) to be added to the card, separated by a comma. If the ability is needed to reconcile your own card, your name must be included here.

I REQUEST A JMU SMALL PURCHASE CHARGE CARD (SPCC) IN MY NAME TO USE SOLELY FOR DEPARTMENTAL PURCHASES. I UNDERSTAND THAT:

1. I am fully responsible for all expenses charged to the card by me. Unauthorized purchases via the Purchase Credit Card may result in loss of the card. I accept full responsibility for any unauthorized personal purchases made with the SPCC.

2. I must only use the card to purchase goods, supplies, and services for operations, maintenance, and repairs, equipment and to purchase air/rail tickets through the Internet if the vendor has a secure website.

3. I must return the card to the Finance Office immediately upon request of my department head or the SPCC Program Administrator, upon terminating employment, or transferring from one University department to another.

4. I must follow University Policies and Procedures and the Small Purchase Charge Card Procedure currently in effect over the SPCC.

5. I must report lost or stolen Small Purchase Charge Cards immediately to the JMU Cash & Investments office, ext #87396.

6. I understand that in order to properly purchase goods and services through the internet, the vendor must have a Secure Socket Layer (SSL) Version 2.0 or greater. To ensure the vendor has a SSL, the address window must start with https://. I will record the vendor's website address on the purchasing log.

☑ I understand and agree to these terms.

The Commonwealth of VA Corporate Purchasing Card Employee Agreement can be found here. Please review this agreement and print a copy for your records.

☑ I have read the Commonwealth of VA Corporate Purchasing Card Employee Agreement terms. I understand and agree to these terms.
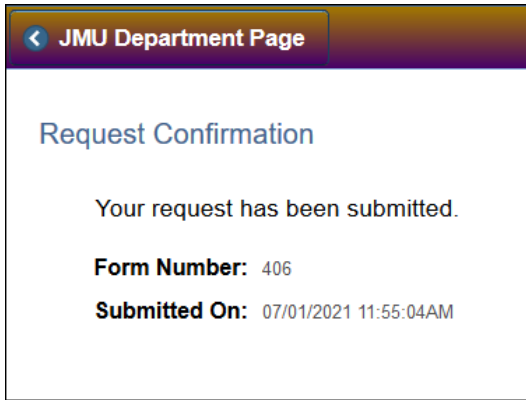
☑ I understand PeopleSoft Finance access is required for SPCC reconcilers.

☑ I understand that once my application is processed, I will be granted access to PeopleSoft Finance to perform card maintenance functions.

Submit   Cancel

You must read and agree to all terms and conditions and then hit the submit button.

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

JMU Department Page

Request Confirmation

Your request has been submitted.

Form Number: 406

Submitted On: 07/01/2021 11:55:04AM

Once your application has been approved by your supervisor and Finance, you will receive an email letting you know the application has been approved.

From:	auto_notifcation@jmu.edu
Sent:	Thursday, July 1, 2021 3:01 PM
To:	Charge Accounts Payable Card Program Administrator
Subject:	SPCC form approved by Finance

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 406
Form Type: SPCC Application
Initiator: Dickens,Caroline Michelle
Date Submitted: 2021-07-01
Note to Initiator: Approved JHB

FORM:
Applicant's Eid: DICKENCM
HR/Employee ID#: ▮▮▮▮▮▮▮▮
Applicant's Name: Dickens,Caroline Michelle
Is Student: Y
JMU Email: hrtest@jmu.edu
JMU Address: 1 DUKE DOG AVENUE
JMU Phone: 540/568-1111
Applicant MSC: 1111
Default DeptID: 100999
Supervisor Name: Catherine Weaver
Supervisor Email: weavercb@jmu.edu
Transaction Limit: $10,000.00
Monthly Limit: $25,000.00
Reconcilers: James Madison, madisojm; Thomas Jefferson, jefferstj

I REQUEST A JMU SMALL PURCHASE CHARGE CARD (SPCC) IN MY NAME TO USE SOLELY FOR DEPARTMENTAL PURCHASES. I UNDERSTAND THAT:

1. I am fully responsible for all expenses charged to the card by me. Unauthorized purchases via the Purchase Credit Card may result in loss of the card. I accept full responsibility for any unauthorized personal purchases made with the SPCC.
2. I must only use the card to purchase goods, supplies, and services for operations, maintenance, and repairs, equipment and to purchase air/rail tickets through the Internet if the vendor has a secure website.
3. I must return the card to the Finance Office immediately upon request of my department head or the SPCC Program Administrator, upon terminating employment, or transferring from one University department to another.
4. I must follow University Policies and Procedures and the Small Purchase Charge Card Procedure currently in effect over the SPCC.
5. I must report lost or stolen Small Purchase Charge Cards immediately to the JMU Cash & Investments office, ext #87396.

Manage Reconcilers

This form is to be used by any current SPCC cardholder who needs to add or delete employees to reconcile their monthly charges in the Bank of America WORKS system. The following fields will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will fill out the last four digits of their card number and all other fields based on what they would like to do. If they want to add a reconciler, they will choose "add" and fill in the cardholder's e-id. If they want to delete a reconciler, they will choose "remove" and fill in the cardholder's e-id. Once complete, click the Submit button in the bottom left corner of the page.

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

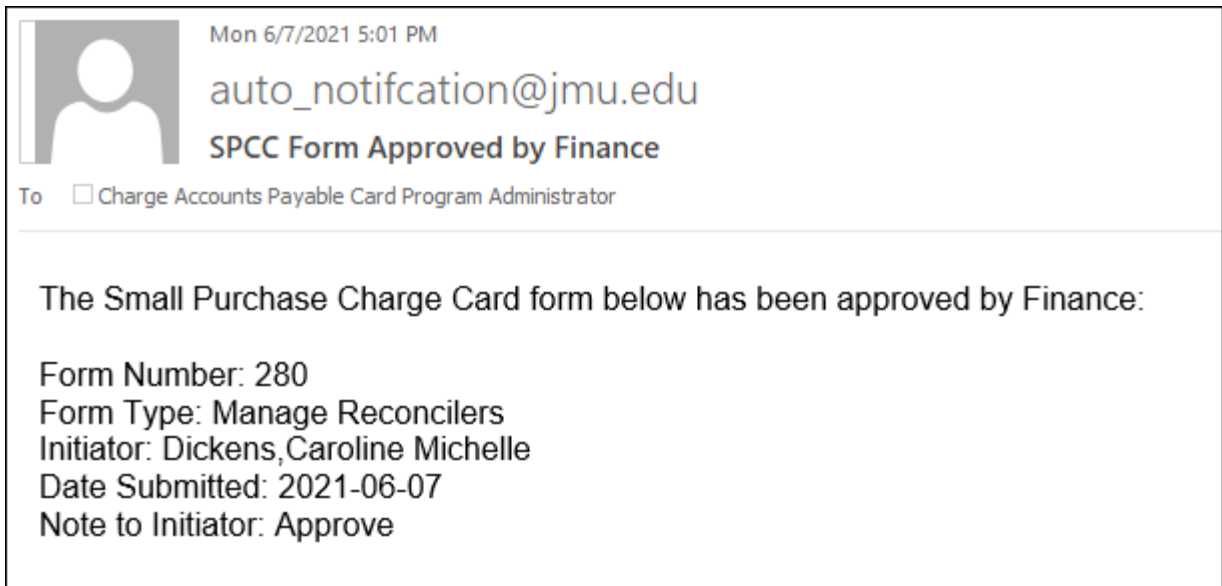Once your form has been approved by Finance, you will receive an email confirmation.

Mon 6/7/2021 5:01 PM

auto_notifcation@jmu.edu

SPCC Form Approved by Finance

To ☐ Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 280
Form Type: Manage Reconcilers
Initiator: Dickens,Caroline Michelle
Date Submitted: 2021-06-07
Note to Initiator: Approve

Note: If the reconciler is a new user to the Bank of America WORKS system, they will receive a welcome email once the Manager Reconcilers form has been completed from Bank of America to setup their profile in Bank of America WORKS.

Cancel SPCC

This form is to be used by cardholders or their supervisors to cancel a current SPCC. Reasons to cancel a card include when an employee leaves employment with the university or changes departments. The following field will be automatically filled in based on your e-id and password:

Requestor's Name

The person filling out this form will need to fill in the following information:

Cardholder's Name
Cardholder's Eid
Cardholder's Last 4 Digits of SPCC

Once complete, click the Submit button in the bottom left corner of the page.

SPCC Cancel

Complete the form below to cancel your JMU Small Purchase Charge Card. The SPCC Cardholder or their Supervisor must complete and submit this form themselves. Once the form is submitted, the form will be routed to Finance Cash & Investments for processing. The SPCC will be cancelled upon receipt. Please destroy the card after submitting this form.

Requestor's Name: Dameron,Joshua M
Cardholder's Name: JOSHUA DAMERON
Cardholder's Eid: DAMEROJM
Last 4 Digits of SPCC: 9876

Submit   Cancel

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

Request Confirmation

Your request has been submitted.

Form Number: 348

Submitted On: 06/15/2021 11:07:25AM

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

From: auto_notifcation@jmu.edu
Mon 6/7/2021 4:01 PM

SPCC Form Approved by Finance

To ☐ Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 258
Form Type: Cancel SPCC
Initiator: Eckert,Jan B
Date Submitted: 2021-06-03

Monthly Credit Limit Increases

This form is to be used by cardholders to request increases to their overall monthly credit limit on their SPCC either temporarily or permanently. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

Cardholder's Last 4 Digits of SPCC
Duration: Permanent or Temporary. For temporary, you can put in a start and end date.
Request Limit: This is the new limit you are requesting.

Once complete, click the Submit button in the bottom left corner of the page.

Permanent Request

Monthly Credit Limit Increase

Complete the form below to increase the monthly credit limit on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves.
Once the form is submitted, the application will be routed to your Supervisor for approval.

Cardholder's Name: Dameron,Joshua M
Last 4 Digits of SPCC: 9876
Duration: Permanent
Request Limit: $50,000.00

Submit   Cancel

Temporary Request

Monthly Credit Limit Increase

Complete the form below to increase the monthly credit limit on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. Once the form is submitted, the form will be routed to your Supervisor for approval.

Cardholder's Name:	Griffith,Livia Saunders
Last 4 Digits of SPCC:	1234
Duration:	Temporary
Start Date:	06/15/2021
End Date:	07/15/2021
Requested Limit:	$15,000

Submit   Cancel

Once you submit, you will receive a request confirmation. This lets you know your form has been submitted successfully.

Request Confirmation

Your request has been submitted.

Form Number: 349

Submitted On: 06/15/2021 11:10:03AM

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

↩ Reply ↩ Reply All ↩ Forward 📨 IM

Mon 6/7/2021 4:01 PM

auto_notifcation@jmu.edu

SPCC Form Approved by Finance

To   ☐ Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 77
Form Type: Monthly Credit Limit Increase
Initiator: Eckert,Jan B
Date Submitted: 2021-05-11

Single Transaction Increases

This form is to be used by cardholders to request increases to their single transaction credit limit on their SPCC either temporarily or permanently. Increases over $10,000 must include a copy of the invoice and eVA EP/PCO or Procurement written approval. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

Cardholder's Last 4 Digits of SPCC
End Date: This is the date the increase will expire.
Request Single Transaction Limit: This is the limit you are requesting.
eVA EP/PCO Number or Exclusion: You must enter an eVA order number or an appropriate exclusion. If you are entering an exclusion, you must attach written permission from the Procurement office before your limit will be increased.
Comment: Use this section to let Cash and Investments know any additional information on the request.
*NOTE: Once you submit the request, you will need to attach a copy of the invoice and any other important documentation related to the request.

Once complete, click the Submit button in the bottom left corner of the page.

Single Transaction Increase

Complete the form below to increase the single transaction limit on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. After clicking Submit, you will have the option to attach supporting documentation. When submitted, the form will be routed to your Supervisor for approval.

Cardholder's Name: Griffith,Livia Saunders
Last 4 Digits of SPCC: 1234
End Date: 06/30/2021
Requested Single Transaction Limit: $15,000.00
eVA EP/PCO Number or Exclusion: EP3340176   *note: exclusions require supporting documentation be attached.*
Cardholder's Comments: Pay Daniel's invoice over $10,000, EP3340176.

After clicking submit, you will have the option to attach supporting documentation.

[Submit]   [Cancel]

Once you click the Submit button, you will then be requested to add attachments. This would include copies of the invoices or any other relevant documentation. Click the Add Attachments button.
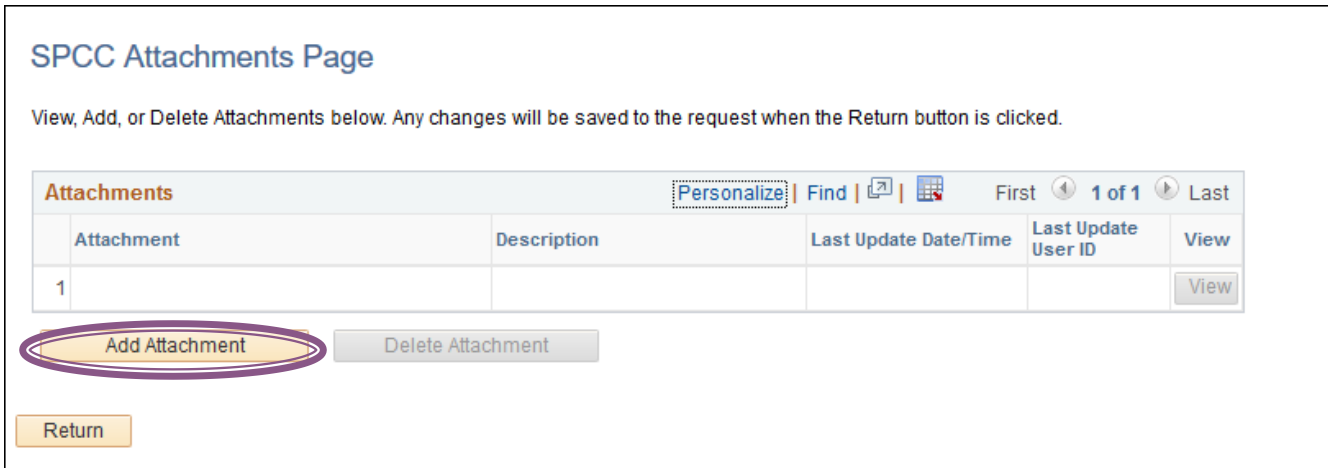
Request Confirmation

Your request has been submitted.

Form Number: 350

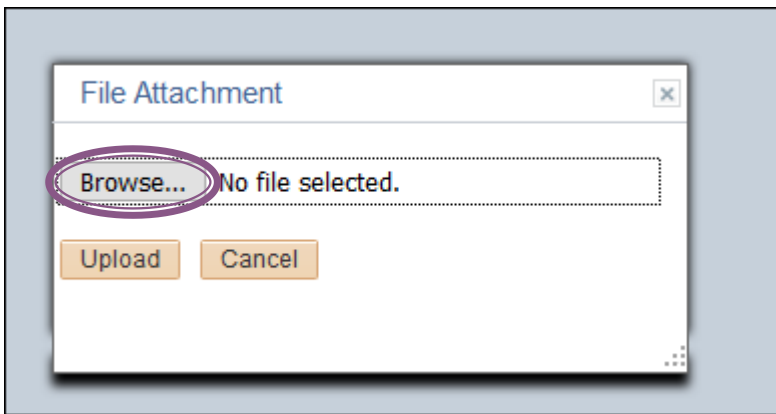**Submitted On:** 06/15/2021 11:19:15AM

Click the Add Attachments button below to add supporting documentation to your request.

After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.
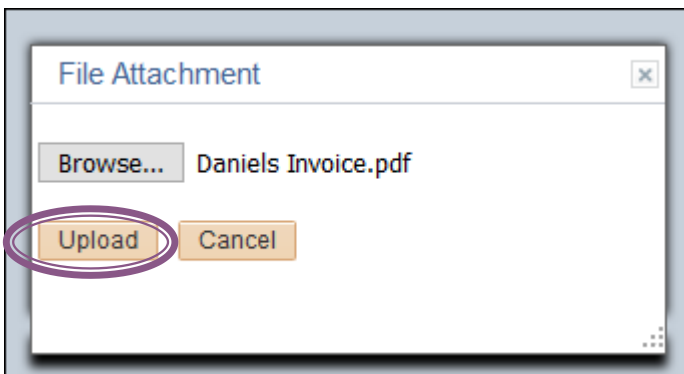
[Add Attachments]

On the SPCC Attachments Page, you will choose "Add Attachment" to upload your relevant documentation.
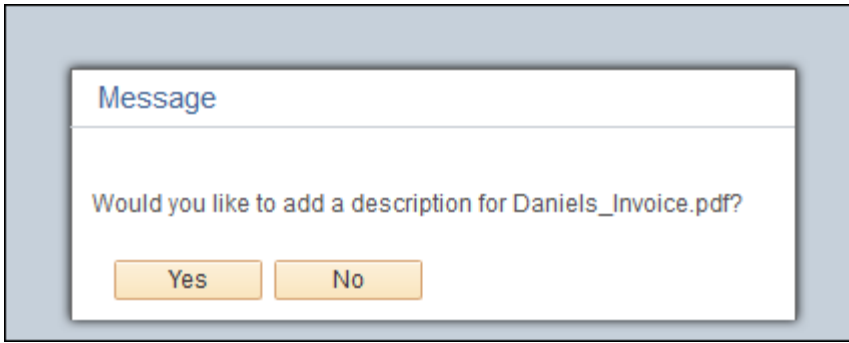
SPCC Attachments Page

View, Add, or Delete Attachments below. Any changes will be saved to the request when the Return button is clicked.

Attachments		Personalize	Find	🗗	🖼	First ◀ 1 of 1 ▶ Last		
	Attachment	Description	Last Update Date/Time	Last Update User ID	View
1					View

Add Attachment   Delete Attachment

Return

You will browse your computer to find the location of the documentation.

File Attachment ✕

Browse...   No file selected.

Upload   Cancel

Once you find your document, you will add it, and hit the Upload button.

File Attachment ✕

Browse...   Daniels Invoice.pdf

Upload   Cancel

You will be prompted to add a description to your document (you do not have to add a description).

If you choose **YES,** you can add up to a 30-character description, then click the OK button
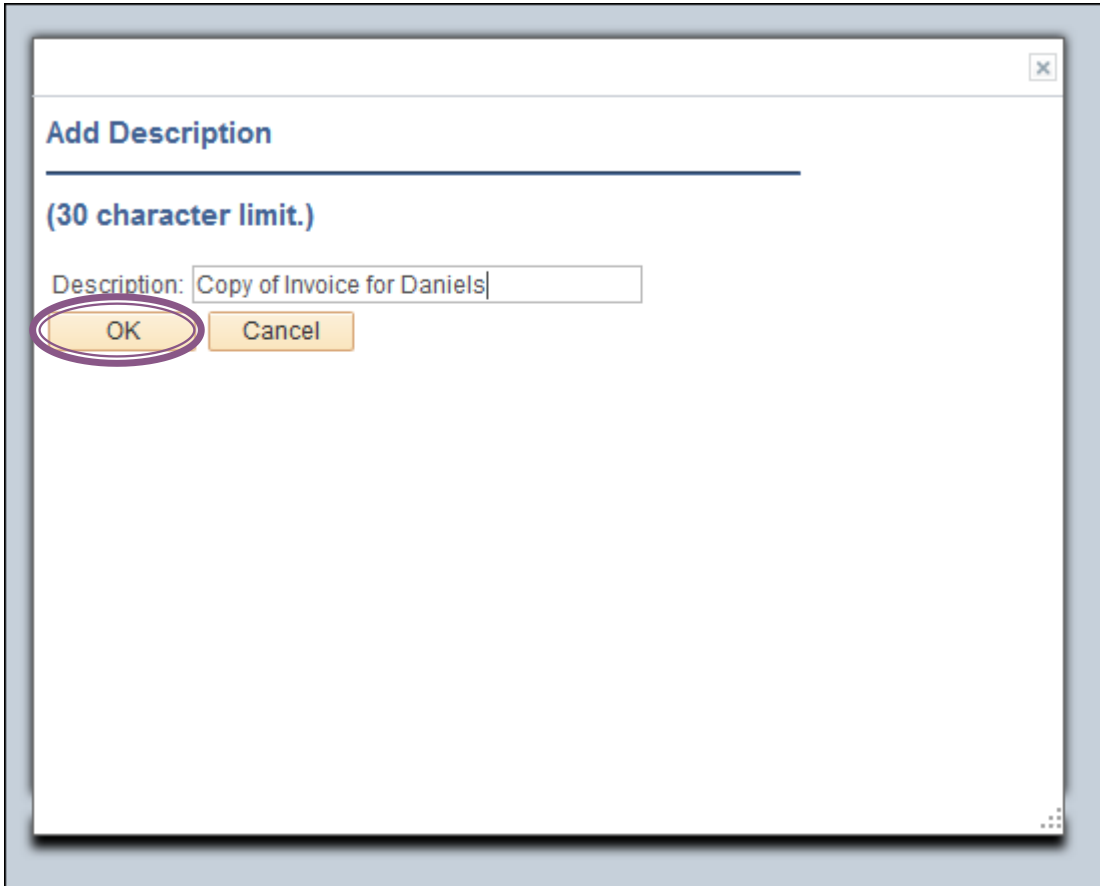
Your attachment will now appear on the SPCC Attachments Page. If it is correct, you can click the Return button. If you'd like to add more, you can click the Add Attachment button again, or you can delete the attachment.

SPCC Attachments Page

View, Add, or Delete Attachments below. Any changes will be saved to the request when the Return button is clicked.

	Attachments		Personalize	Find	🗗	📊	First ◀ 1 of 1 ▶ Last		
	Attachment	Description	Last Update Date/Time	Last Update User ID	View	Delete?
1	Daniels_Invoice.pdf	Copy of Invoice for Daniels	06/15/21 11:30:31AM	GRIFFILS	View	☐

[Add Attachment]   [Delete Attachment]

([Return])

When you click the Return button, you will be taken back to the Request Confirmation page. This shows your request has been submitted.

Request Confirmation

### Your request has been submitted.

Form Number: 350

Submitted On: 06/15/2021 11:19:15AM

Click the Add Attachments button below to add supporting documentation to your request.

After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.

[Add Attachments]

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.
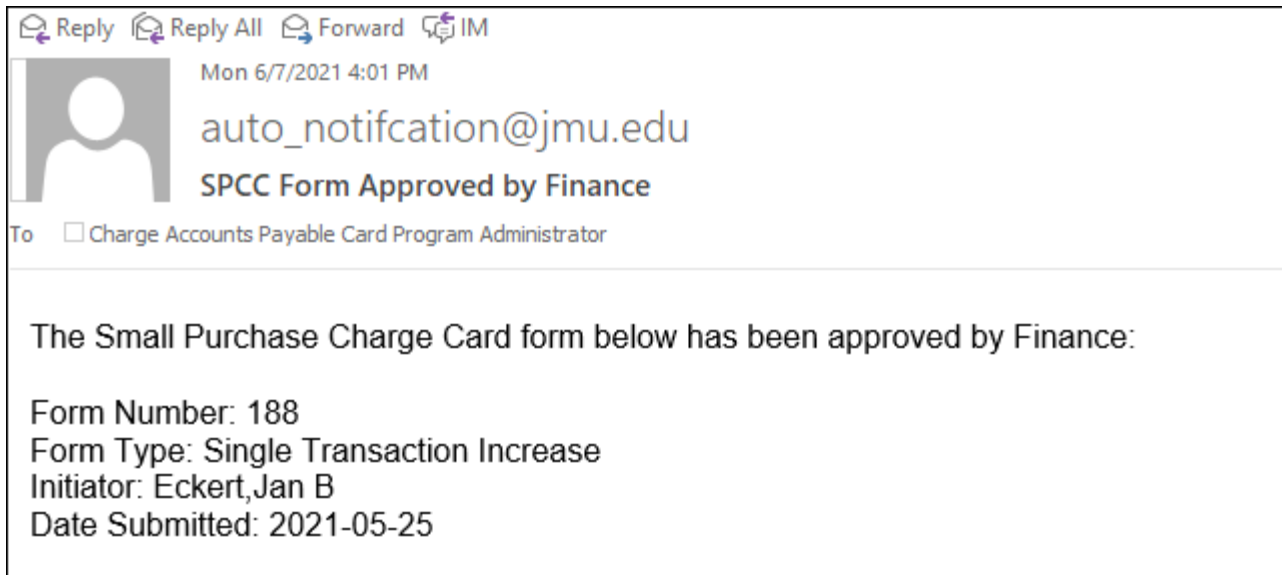
Exception Request

This form is used by cardholders to request any exception for a Merchant Category Code (MCC) restriction on the SPCC. The following field will be automatically filled in based on your e-id and password:

Cardholder Name

The cardholder will need to fill in the following information:

Cardholder's Last 4 Digits of SPCC
Duration: Permanent or Temporary, for temporary, you will put in a start and end date.
Exception Type: This is the MCC Code you want lifted on the card.
Justification: Use this section to let Cash and Investments know any additional information on the request. You must have something in this field for approval.

Once complete, click the submit button in the bottom left corner of the page.

Temporary Request

Exception Request

Complete the form below to request an exception on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. After clicking Submit, you will have the option to attach supporting documentation. Once the form is submitted, the form will be routed to your Supervisor for approval.

Cardholder's Name: Griffith,Livia Saunders

Last 4 Digits of SPCC: 1234

Duration: Temporary

Start Date: 06/15/2021

End Date: 06/30/2021

Exception Type: Restaurant

Justification: To purchase pizza for year end meeting

Cardholder's Comments: Annual meeting with all student employees and faculty/staff to go over accomplishments and make goals for next academic year

After clicking submit, you will have the option to attach supporting documentation.

Submit   Cancel

Permanent Request

Exception Request

Complete the form below to request an exception on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. After clicking Submit, you will have the option to attach supporting documentation. Once the form is submitted, the form will be routed to your Supervisor for approval.

Cardholder's Name: Griffith,Livia Saunders

Last 4 Digits of SPCC: 1234

Duration: Permanent

Exception Type: Restaurant

Justification: To purchase pizza student related activities

Cardholder's Comments:

After clicking submit, you will have the option to attach supporting documentation.

Submit   Cancel

Once you click the Submit button, you will then be requested to add attachments. This would include copies of the invoices or any other relevant documentation. Click the Add Attachments button.

Request Confirmation

Your request has been submitted.

Form Number: 351

Submitted On: 06/15/2021 11:40:21AM

Click the Add Attachments button below to add supporting documentation to your request.

After adding attachments and clicking the Return button on the SPCC Attachments Page, your attachments will be saved to the request and you will be returned to this page. You can then navigate away from this page.

Add Attachments

==*The adding an attachment process is the same as for single transaction limit requests. See page 13 for detailed instructions.*== The request confirmation page shows your request has been submitted.

Once the form has been approved by Finance, you will receive an email to keep with your SPCC records.

Mon 6/7/2021 4:00 PM

auto_notifcation@jmu.edu

SPCC Form Approved by Finance

To ☐ Charge Accounts Payable Card Program Administrator

The Small Purchase Charge Card form below has been approved by Finance:

Form Number: 264
Form Type: Exception Request
Initiator: Eckert,Jan B
Date Submitted: 2021-06-03

Request Confirmation

Your request has been submitted.

Form Number: 352

Submitted On: 06/15/2021 11:49:23AM

Approvals

My Madison Approvals

When a form has been submitted, supervisors will receive an email letting them know they have a form to approve.

From: auto_notifcation@jmu.edu <auto_notifcation@jmu.edu>
Sent: Thursday, July 1, 2021 1:00 PM
To: Charge Accounts Payable Card Program Administrator <appa@jmu.edu>; Charge Accounts Payable Card Program Administrator <appa@jmu.edu>
Subject: SPCC Form Awaiting Your Approval

The Small Purchase Charge Card form below has been electronically submitted and is awaiting your approval:

Form Number: 406
Form Type: SPCC Application
Initiator: Dickens,Caroline Michelle
Date Submitted: 2021-07-01

Please log into MyMadison to approve/deny the form.

Supervisors will be able to approve all SPCC forms within MyMadison Approvals. MyMadison can be reached from the Faculty/Staff Main home page at: https://www.jmu.edu/gateway/faculty-staff.shtml On the left-hand side, there is a gray shaded box, and MyMadison is listed in that box.
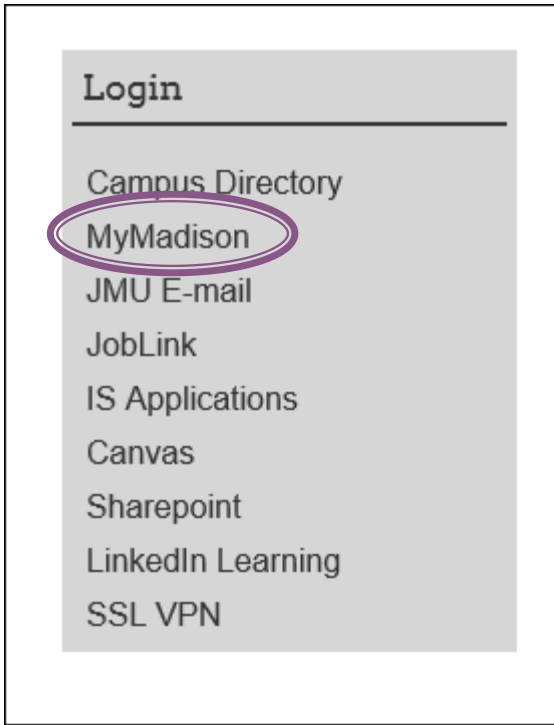
You will use your e-id and password to log in. System access does require Duo authentication.
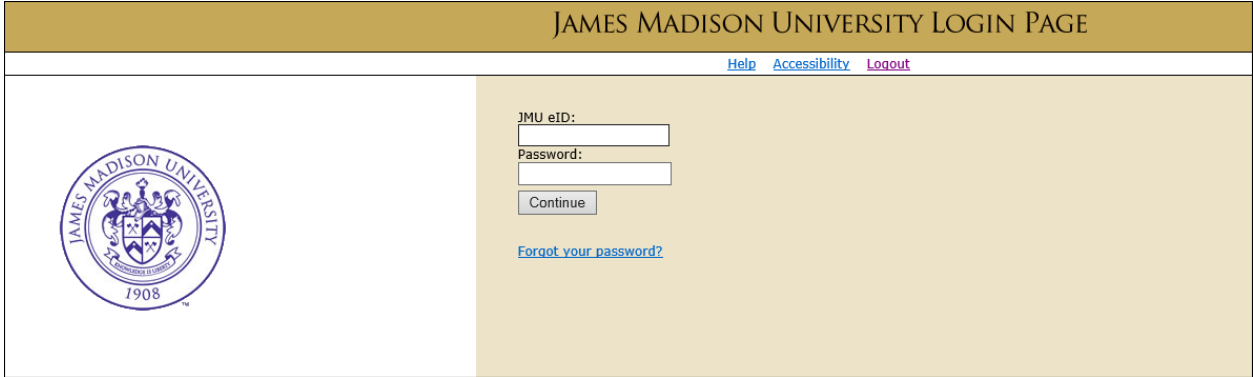
From the My Approvals tab in MyMadison, the supervisor will see how many SPCC forms are in their pending approvals, under Finance. Click on the blue hyper link *SPCC Forms* to be taken to the My Approvals-Finance.

MyMadison	Employee	Faculty	Advisor	MyAccounts	MyServices	**MyApprovals**

Main Menu ▾

My Approvals - Finance

Personalize | Find | 🗗 | 📰   First ◀ 1-7 of 7 ▶ Last

	Initiator Name	Action	View Application	View Routing	View Attachments	View/Add Comments
☐ SPCC Form – Manage Department IDs Form Number: 331 Cardholder's Name: Charles Cook Last 4 Digits of SPCC: 3424 Action: Add Department ID: ACADF2 Date Submitted: 06/10/2021	Cook,Charles Christopher	⌄		View Routing		View/Add Comments
☐ SPCC Form – SPCC Application Form Number: 347 Applicant's Name: Livia Griffith Date Submitted: 06/15/2021 Default Deptid #: 100727 Transaction Limit: $10,000.00 Monthly Limit: $10,000.00 Reconciler(s) Name(s): Barb, Jennifer: hartjd@jmu.edu	Griffith,Livia Saunders	⌄	View Application	View Routing		View/Add Comments
☐ SPCC Form – Monthly Credit Limit Increase Form Number: 349 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 Duration: Temporary Start Date: 06/15/2021 End Date: 07/15/2021 Requested Limit: $15,000.00 Date Submitted: 06/15/2021	Griffith,Livia Saunders	⌄		View Routing		View/Add Comments
☐ SPCC Form – Single Transaction Increase Form Number: 350 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 End Date: 06/30/2021 Requested Single Transaction Limit: $15,000.00 eVA EP/PCO Number or Exclusion: EP3340176 Cardholder's Comments: Pay Daniel's invoice over $10,000, EP3340176. Date Submitted: 06/15/2021	Griffith,Livia Saunders	⌄		View Routing	View Attachments	View/Add Comments
☐ SPCC Form – Exception Request Form Number: 351 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 Duration: Temporary Start Date: 06/15/2021 End Date: 06/30/2021 Exception Type: Restaurant Justification: To purchase pizza for year end meeting Cardholder's Comments: Annual meeting with all student employees and faculty/staff to go over accomplishments and make goals for next academic year Date Submitted: 06/15/2021	Griffith,Livia Saunders	⌄		View Routing	View Attachments	View/Add Comments

From the My Approvals Tab, the approver can do the following:

View Application - on any SPCC Application, the approver can view the form by clicking the View Application button.

	Initiator Name	Action	View Application	View Routing		View/Add Comments
☐ SPCC Form – SPCC Application Form Number: 347 Applicant's Name: Livia Griffith Date Submitted: 06/15/2021 Default Deptid #: 100727 Transaction Limit: $10,000.00 Monthly Limit: $10,000.00 Reconciler(s) Name(s): Barb, Jennifer: hartjd@jmu.edu	Griffith,Livia Saunders	⌄	(View Application)	View Routing		View/Add Comments

The application will come up for the approver to review. Once reviewed, click the Cancel button at the bottom of the application to return to the approvals page.

Monthly Limit: $10,000.00

Reconciler(s) for Card: Jennifer Barb, hartjd

Include the First / Last Name and Eid of all reconciler(s) to be added to the card, separated by a comma. If the ability is needed to reconcile your own card, your name must be included here.

Submit Date: 07/07/2021 11:33:08AM

I REQUEST A JMU SMALL PURCHASE CHARGE CARD (SPCC) IN MY NAME TO USE SOLELY FOR DEPARTMENTAL PURCHASES. I UNDERSTAND THAT:

1. I am fully responsible for all expenses charged to the card by me. Unauthorized purchases via the Purchase Credit Card may result in loss of the card. I accept full responsibility for any unauthorized personal purchases made with the SPCC.

2. I must only use the card to purchase goods, supplies, and services for operations, maintenance, and repairs, equipment and to purchase air/rail tickets through the Internet if the vendor has a secure website.

3. I must return the card to the Finance Office immediately upon request of my department head or the SPCC Program Administrator, upon terminating employment, or transferring from one University department to another.

4. I must follow University Policies and Procedures and the Small Purchase Charge Card Procedure currently in effect over the SPCC.

5. I must report lost or stolen Small Purchase Charge Cards immediately to the JMU Cash & Investments office, ext #87396.

6. I understand that in order to properly purchase goods and services through the internet, the vendor must have a Secure Socket Layer (SSL) Version 2.0 or greater. To ensure the vendor has a SSL, the address window must start with https://. I will record the vendor's website address on the purchasing log.

   ☑ I understand and agree to these terms.

The Commonwealth of VA Corporate Purchasing Card Employee Agreement can be found here. Please review this agreement and print a copy for your records.

   ☑ I have read the Commonwealth of VA Corporate Purchasing Card Employee Agreement terms. I understand and agree to these terms.

   ☑ I understand PeopleSoft Finance access is required for SPCC reconcilers.

   ☑ I understand that once my application is processed, I will be granted access to PeopleSoft Finance to perform card maintenance functions.

Cancel

View Routing - this will show the approver the routing of the form. To view, click on the View Routing button.

The forms approval routing will come up; once the approver has reviewed, they can click the Return button to go back to the My Approvals-Finance page.
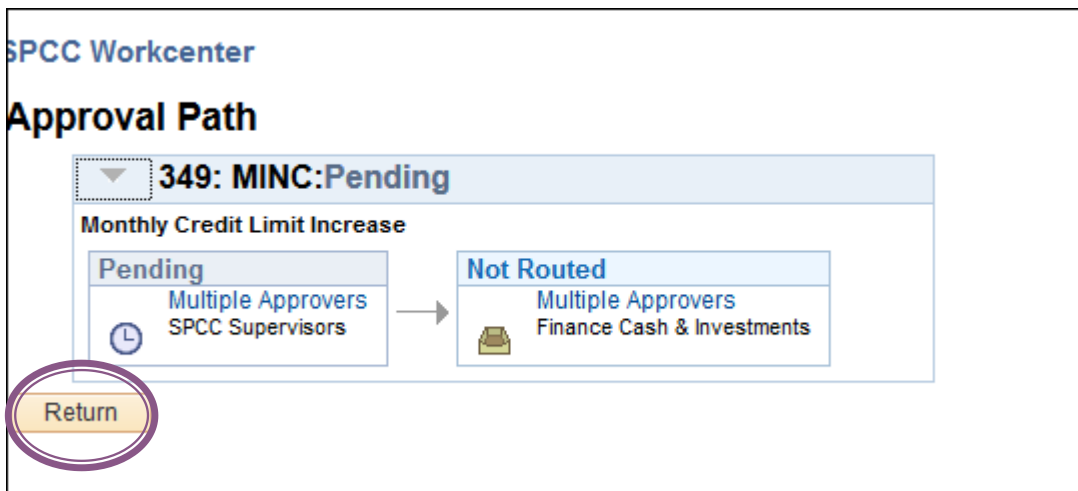
View Attachments - if a form has an attachment, the approver can view that attachment by clicking the View Attachments button.

This will take the approver to the SPCC Attachments page. Click on the View button to pull up an image of the attachment. *Note you may need to enable pop-ups to see the attachment* After viewing the attachment, the approver would click the Return button to go back to the My Approvals-Finance Page.

View/Add Comments - if any comments have been made about a submitted form, the approver could view them there as well as make comments.

If the approver would like to make a comment here, they can do so by selecting the Add Comment button.

Once the approver adds the comment, you will see it added on the SPCC Workcenter comments. If complete, click the Return button to go back to the My Approvals-Finance page.

Once an approver has reviewed all documentation, they will either approve or deny the form. To do this, they will choose, under Action, either Approve or Deny. Make sure the check box on the far left is checked for the row you are working on.
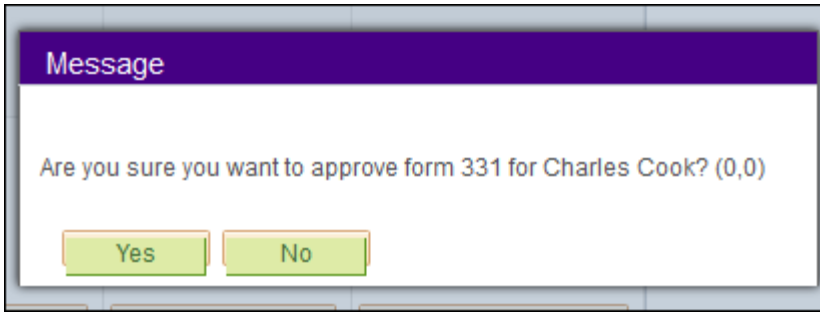

Once the correct status has been entered and the box on the left is checked, the approver will scroll to the bottom of the page and click the Submit button on the lower left corner.


A message will pop up confirming the approver's action. If correct, click the Yes button. If incorrect, click the No button.

Once the approver has approved the form, it will be sent to Finance for final approval.

If the form is denied by the approver, the form will be rejected, and the cardholder would need to submit again if the request is still needed.

When an approver denies a form, they will be required to add a denial reason that will be sent back to the cardholder or initiator. Once complete, the approver will click the OK button.
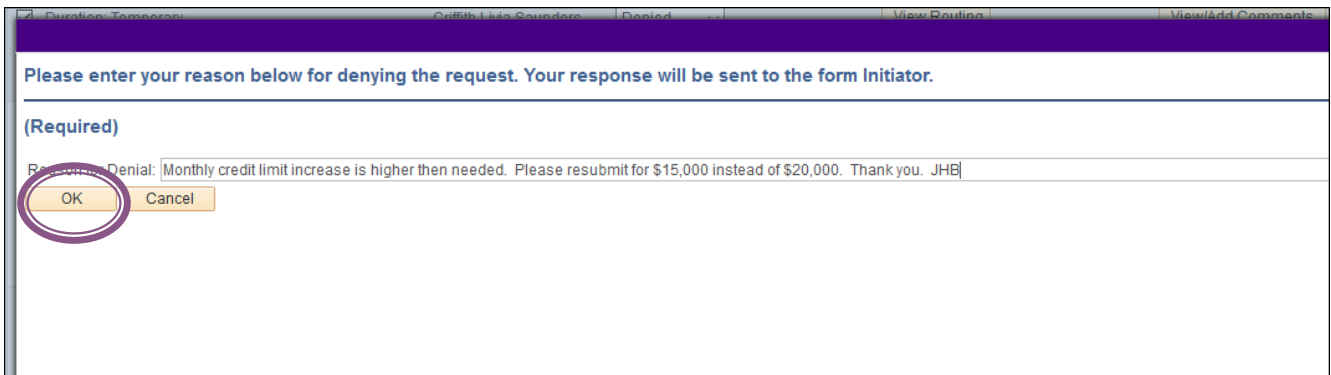

If the approver has several forms to approve and wants to approve them all at once, they would click the Select All hyperlink and the Set Checked to Approve hyperlink at the bottom of the page. This will set all lines to approve at once when the Submit button is clicked.

My Approvals - Finance

Personalize | Find | 🗗 | 🔢   First ◀ 1-5 of 5 ▶ Last

		Initiator Name	Action	View Application	View Routing	View Attachments	View/Add Comments
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☑	**SPCC Form – Manage Department IDs** Form Number: 352 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 Action: Add Department ID: 100709 Date Submitted: 06/15/2021	Griffith,Livia Saunders	Approved ∨		View Routing		View/Add Comments
☑	**SPCC Form – Manage Department IDs** Form Number: 352 Cardholder's Name: Livia Griffith Last 4 Digits of SPCC: 1234 Action: Add Department ID: 539433 Date Submitted: 06/15/2021	Griffith,Livia Saunders	Approved ∨		View Routing		View/Add Comments

Select All   Clear All   Set Checked to Approve

Submit

A pop up message will appear for each form confirming you want to approve all the forms (the number of forms you are approving will appear in the box). If everything is correct, the approver would click the Yes button.

Message

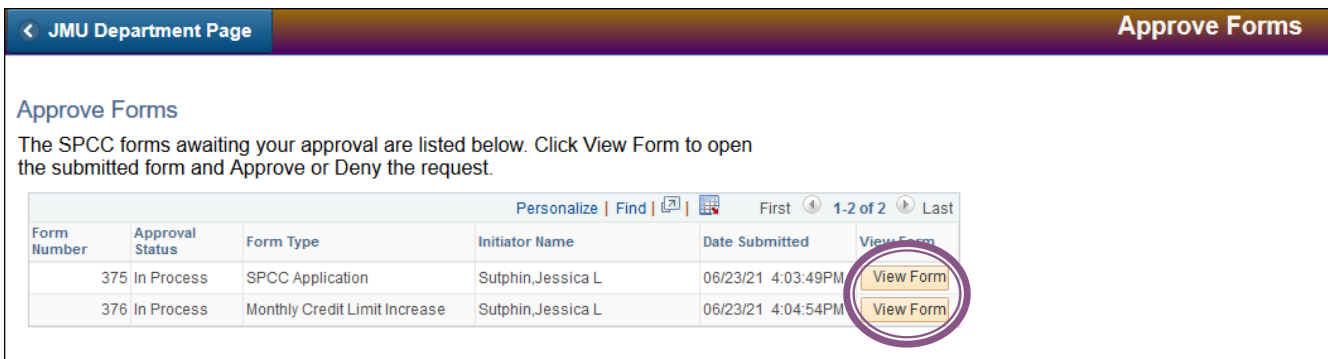Are you sure you want to approve 4 forms? (0,0)

Yes   No
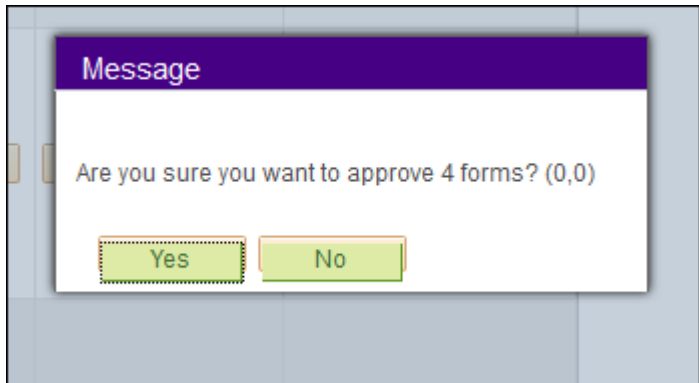
PeopleSoft Finance Approvals

Supervisors who have access to PeopleSoft Finance can also approve forms through PeopleSoft Finance JMU Workflow. Under the Navigator > JMU Applications > JMU Workflow > SPCC > Approve Forms
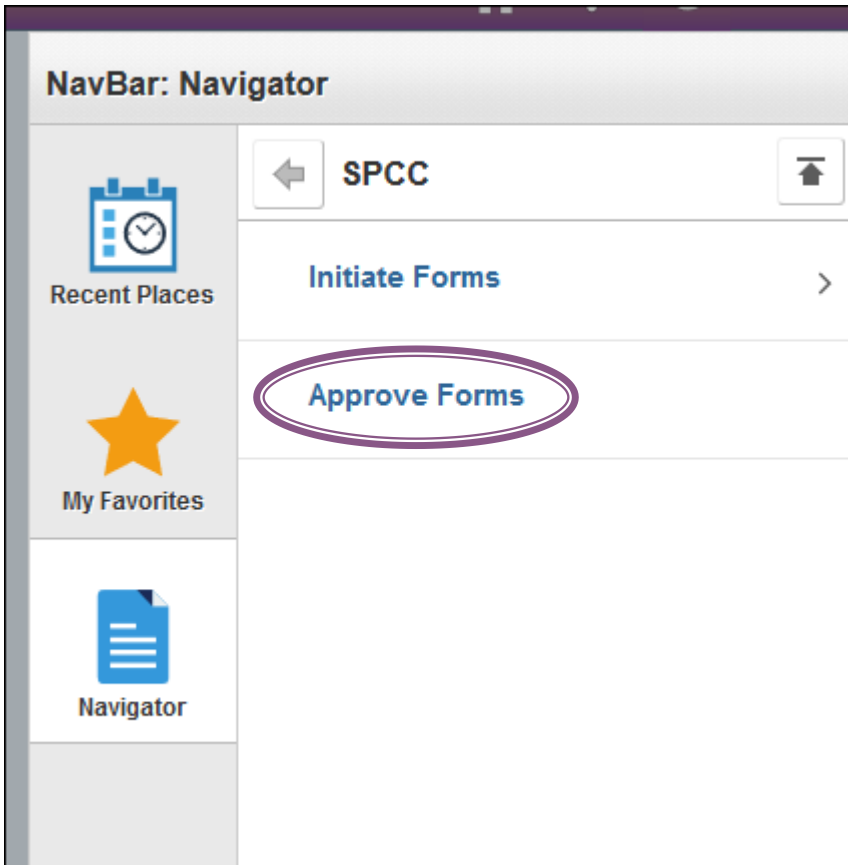
The Approve Forms Page will come up.

On each form, click the View Form button in order to view and approve.

Approve SPCC Forms

Monthly Credit Limit Increase

Complete the form below to increase the monthly credit limit on your JMU Small Purchase Charge Card. The SPCC Cardholder must complete and submit this form themselves. Once the form is submitted, the form will be routed to your Supervisor for approval.

|	
Form Number:	376
Approval Status:	In Process
Cardholder's Name:	Sutphin,Jessica L
Last 4 Digits of SPCC:	2534
Duration:	Temporary
Start Date:	06/15/2021
End Date:	07/15/2021
Requested Limit:	$25,000.00
Submit Date:	06/23/2021 4:04:54PM

Approve   Deny

View Routing   Add Comments

Cancel

After reviewing the form, you can choose to approve or deny the form depending on your decision. You can also view the routing and add comments for the cardholder and Finance.

Approve

You will choose the Approve button. A pop-up box will come up to confirm you want to approve the form. If you choose yes, the form will be approved and moved to the next routing approval.

Message

Are you sure you want to approve this form? (0,0)

Yes   No
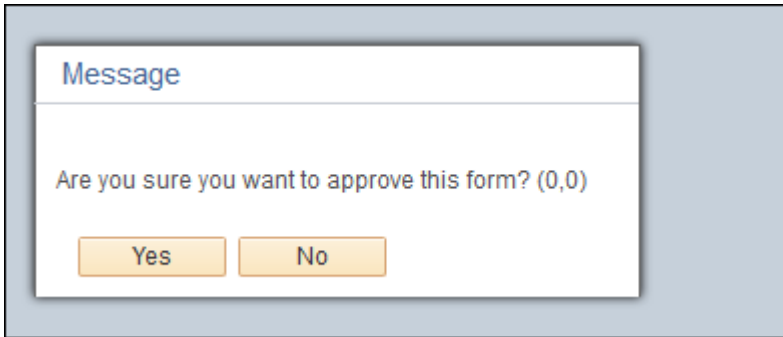
Deny

You will choose the Deny button. A pop-up box will come up to confirm you want to deny the form. If you choose yes, an additional box will come up requiring you to put in a reason for denial. You must type a reason and hit the OK button.

Message

Are you sure you want to deny this form? (0,0)

Yes   No
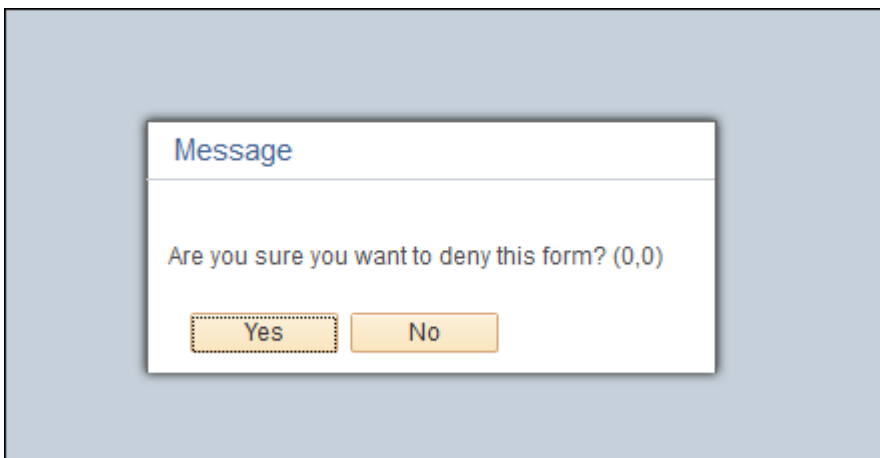
Please enter your reason below for denying the request. Your response will be sent to the form Initiator.

(Required)

Reason for Denial: Increase not needed at this time.

OK   Cancel

Cash & Investments: **appa@jmu.edu** (Departmental mailbox monitored during business hours)

SPCC Program Administrators:

Jennifer Hart Barb   568-7396   hartjd@jmu.edu

Racheal Estep   568-6771   esteprm@jmu.edu

Kristin Johnston   568-8061   john32km@jmu.edu

Tish Leeth   568-3205   leethtc@jmu.edu