

PCard Account Code Change Request Ticket Process-via Incident IQ



Cardholders only have ongoing access to their own school/department account codes in Bank of America Works. If another department allows a school/department to access their funding, the budget holder must email approval and the full account code.

The Cardholder will not be able to directly input that account code in Works, but should follow the below procedure.

1. Sign off on the transaction in Works with your department/school's default account code and attach supporting documents as usual.
2. Complete the Account Code Change request form by submitting a Request for Services at: <https://support.pps.net/support/home>.
3. Attach approval email from the other department to your ticket.
4. A ticket number will be emailed to you.
5. Once your manager/principal has reviewed and signed off in Works, the account code will be updated by the PCard Accountant.
6. When the account code has been updated and ticket closed, an automated email will be sent.

Timing: Since the PCard Accountant cannot update the account code until the cardholder's budget holder/manager/supervisor has signed off in Works, this process may take some time. For example: Cardholder purchases in August and submits the account code change request ticket, Cardholder sign off deadline is September 7th and the budget holder deadline is September 12th. The PCard Accountant must update in Works before September 30th prior to the upload to Peoplesoft.

Best Practice: Organize your tickets by account code and submit as many transactions per ticket as needed. If more than 4 transactions need update, attach a list to the ticket or add in the note area.

Ticket Creation:

As of 8/4/2025 PPS has a new vendor for ticket submissions, Incident IQ. The process is much the same as in the prior platform with small format changes.

To access the new platform, type in your browser search bar: support.pps.net

OR navigate to the PCard forms page: <https://www.pps.net/Page/1343>

1) Click on the link at the bottom of the page (See below).

P-Card Forms

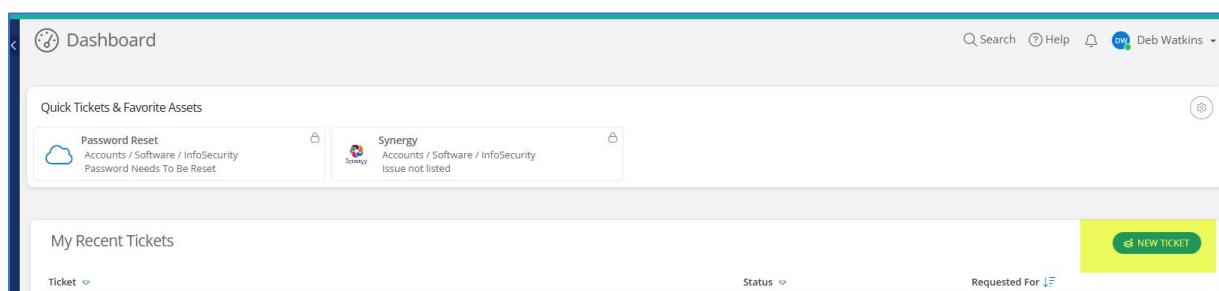
How to Apply for a PCard or Proxy Reconciler in WORKS

- [PCard Application](#)
 - Complete PCard Application, signed by you and your supervisor/budget holder
 - Complete PCard Application training in Pepper. Print off certificate. Here is the link [t](#)
 - Email both the signed Application form and the Pepper Certificate to PCard@pps.net
 - NOTE: It may take up to 7-10 business days from time of application and training cer
- [PCard Adding a Proxy Reconciler](#)
 - Choose whether for whole department or for budget holder only
 - Form must be signed by supervisor/budgetholder
 - Email form to PCard@pps.net

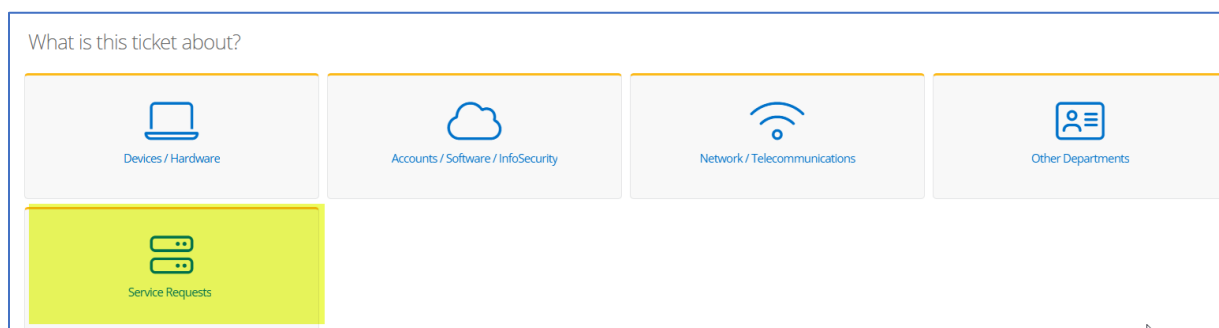
Account Code Change Request Ticket:

- [PCard Account Code Change Request - Support Portal](#)

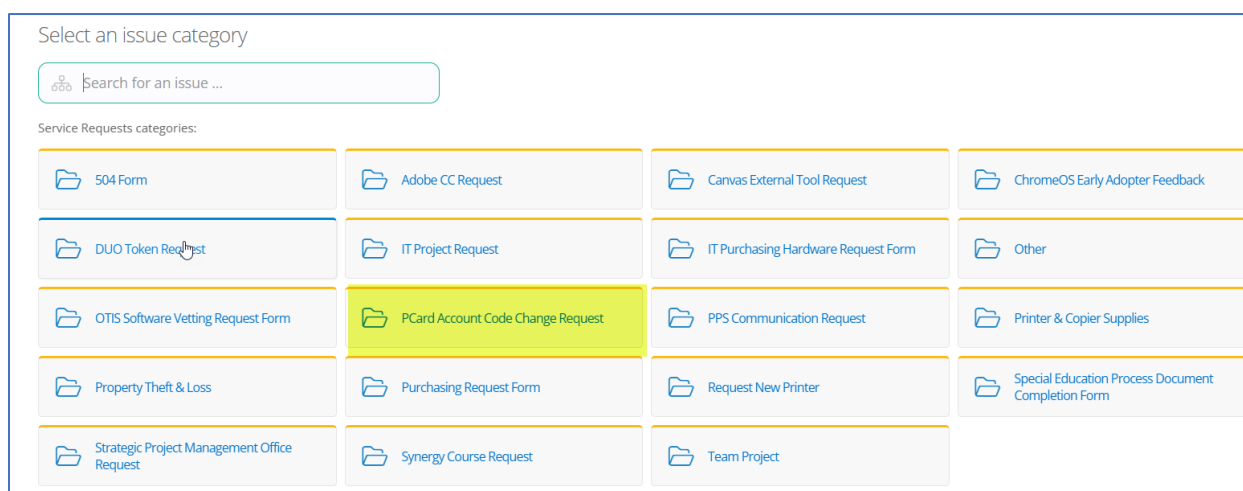
2) The link will take you to your **Incident IQ dashboard** page. Click on “New Ticket”.



3) Choose “Service Requests”.



4) From the **Issue Category** Screen, choose “PCard Account Code Change Request”.



5) Complete all required information (you may skip the “Describe your issue” section at the top).

Describe your issue

Please describe your specific issue in more detail...

Request form for changing PCard Account Codes

Transactions must be signed off in WORKS by supervisor PRIOR to submission.

- Cardholder - Reconciles with department default Account Codes.
- Cardholder Supervisor - Signs off Transaction(s) in WORKS.
- Attach Budget Holder approval.

Cardholder INFORMATION

Cardholder Name *

Cardholder Location (school / dept) *

As in the prior ticket system the following starred fields are required:

- Cardholder name
- Cardholder Location/Department
- Full account code required in this format: Fund-Function-Object-Location-Area-Project-Dept
- Month transactions posted (one month only)
- TXN number to be updated
- Vendor Name
- Transaction amount
- Amount of Transaction to be updated to the new account code
- A brief description of the need for account code change.
- Attach an approval email from budget holder of the department from which you are requesting funds (not your principal or manager)** Your ticket will not be updated without written approval.

Repeat the above information for as many transactions needed up to 4 in the form. Any additional transactions can be noted in the box below or an excel/word document listing additional transaction numbers.

REQUESTED ACCOUNT CODES

Account Code •
(Fund-Function-Object-Location-Area-Project-Dept)

PLEASE ATTACH BUDGET HOLDER APPROVAL BELOW UNDER ATTACH FILES

TRANSACTION(S) REQUIRING ACCOUNT CODES UPDATE

Important Note: If only a portion of a transaction needs to be changed to the requested Account Codes, enter that amount for the allocated to the requested Account Codes.

Month PCard transaction(s) posted (e.g. June) - Submit additional tickets for any other month •

TXN Number #1 •

Vendor #1 •

Total Transaction Amount (\$) #1 •

Amount to Update (\$) #1 •







TXN Number #2

Vendor #2

Total Transaction Amount (\$) #2







If more than 4 transaction updates are needed, add the TXN numbers, vendor names and dollar amounts below or indicate a spreadsheet is attached.

TXN numbers, vendor names, dollar amounts, or spreadsheet attached.

B I H      66 Q PREVIEW 

Drop files here to upload

Brief description of need for change •


B I H      66 Q PREVIEW 

Drop files here to upload

REQUIRED: Budget holder approval from the department of the account code you are requesting must be attached to the ticket. We cannot update without their specific approval.

Attach file(s)

Upload any files or screenshots you have that can help resolve the issue.

Select file to attach
Drag and drop file(s) here
or click to [browse files](#)

< GO BACK

✓ SUBMIT TICKET