

## 1.5 Financial Management

### 1.5.1 Creating/Updating a New Organization

Profiles created under the Financial Management section are for use by duty stations that will create and submit applications on behalf of applicants who do not have access to the PCIT web application. Only one profile per company/organization is needed. ACOs can create a new applicant organization by completing the following steps:

1. Select the Financial Management link at the left side of the screen.

**RESULT:** The *Applicant Organization Financial Transactions* page appears.

The screenshot displays the 'Applicant Organization Financial Transactions' page. At the top, it says 'Welcome Mary Davis of Skagway (PPO)' with a 'Sign Out' link. The page title is 'Applicant Organization Financial Transactions'. On the left is a navigation menu with items like 'PCIT Home', 'My Workload', 'My Duty Station Workload', 'Create/Update Applications', 'View Certificates', 'View Processed Applications', 'Financial Management' (highlighted), 'Print Wizard', and 'View Reports'. Below the menu is an 'EXCERPT' section. The main content area contains the following text:

All money used to pay for certificate fees should be drawn from the applicant's pre-purchase account. Manual payments (i.e., checks or money orders from the applicants) should be deposited into the applicant's pre-purchase account. Searching for the applicant organization below will allow you to update their pre-purchase account and to also charge for certificates issued outside of PCIT.

Enter the organization/applicant name (or a part of the name using wildcards "\*\*") and click the 'Search' button. You may also search by Org ID. Once you search and if no matches are found, you will have the opportunity to add an account for new applicants. Click here for [search tips](#).

**IMPORTANT TIP:** You should NEVER have to create a new applicant organization account if the money being deposited is for applications submitted within the PCIT system.

Enter Organization Name:

Or

Org ID:

No organizations were found at this time. To avoid adding possible duplicate industry organizations, please try searching with the wildcard character. See search tips above for help.

At the bottom, there are links for 'USDA | APHS | Export Program Manual | Help/Contact Us'.

2. Search for an organization by entering the name (or part of the name using wildcards “\*”) and click the **Search** button.

**NOTE:** To avoid adding possible duplicate industry organizations, please try searching with the wildcard character. Click the [search tips](#) link for additional help.

**RESULT:** After a search is performed, the **Create Applicant Org.** button appears.

The screenshot displays the USDA Phytosanitary Certificate Issuance & Tracking System (PCIT) interface. At the top, it says "Welcome Mary Davis of Skagway (PPQ) (Org ID 10951) Sign Out". The main heading is "Applicant Organization Financial Transactions".

On the left is a navigation menu with items like "PCIT Home", "My Workload", "My Duty Station Workload", "Create/Update Applications", "View Certificates", "View Processed Applications", "Financial Management", "Print Wizard", "View Reports", and "EXCERPT".

The main content area contains the following text:
 

All money used to pay for certificate fees should be drawn from the applicant's pre-purchase account. Manual payments (i.e., checks or money orders from the applicants) should be deposited into the applicant's pre-purchase account. Searching for the applicant organization below will allow you to update their pre-purchase account and to also charge for certificates issued outside of PCIT.

Enter the organization/applicant name (or a part of the name using wildcards "\*\*") and click the 'Search' button. You may also search by Org ID. Once you search and if no matches are found, you will have the opportunity to add an account for new applicants. Click here for [search tips](#).

**IMPORTANT TIP:** You should NEVER have to create a new applicant organization account if the money being deposited is for applications submitted within the PCIT system.

There are two input fields: "Enter Organization Name:" with the value "Sunshine" and "Org ID:". Below these are buttons for "Clear", "Search", and "Create Applicant Org.". The "Create Applicant Org." button is circled in red.

At the bottom of the main content area, a message states: "No organizations were found at this time. To avoid adding possible duplicate industry organizations, please try searching with the wildcard character. See search tips above for help."

The footer contains links for "USDA", "APHIS", "Export Program Manual", and "Help/Contact Us".

- Click the **Create Applicant Org.** button.  
RESULT: The *Create an Applicant Organization* page appears.

USDA Phytosanitary Certificate Issuance & Tracking System (PCIT)

Welcome **Mary Davis of Skagway (PPO) (Org ID 10951)** [Sign Out](#)

### Create an Applicant Organization

Please create a profile for the company/organization. Only one profile per company/organization is needed. Profiles created here are for use by duty stations who will create and submit applications on behalf of applicants who do not have access to the PCIT web application.  
Items marked \* are required.

**Company/Org. Admin Name:** \* Sue  Z  Sunshine   
First Name M.I. Last Name

**Company/Org. Name:** \*

**Street Address:** \*

**City:** \*

**State/Territory:** \*

**Zip Code:** \*

**Phone:** \*  **Fax:**

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- Complete the required fields of the *Create an Applicant Organization* page according to the following field chart:

Field	Notes
Company/Org. Admin Name	<ul style="list-style-type: none"> <li>Name of the organizational/company administrator (including first name, middle initial and last name).</li> </ul>
Company/Org. name	<ul style="list-style-type: none"> <li>Name of the organization/company.</li> </ul>
Street Address	<ul style="list-style-type: none"> <li>The organization/company street address.</li> </ul>
City	<ul style="list-style-type: none"> <li>The organization/company city.</li> </ul>
State/Territory	<ul style="list-style-type: none"> <li>State/Territory in which the organization/company is located.</li> </ul>
Zip Code	<ul style="list-style-type: none"> <li>Zip code of the organization/company address.</li> <li>Zip code can be five-digits or nine-digits.</li> </ul>
Phone	<ul style="list-style-type: none"> <li>Ten-digit organization/company telephone number includes the area code.</li> <li>In addition, you may enter an extension number.</li> </ul>
Fax	<ul style="list-style-type: none"> <li>The organization/company fax number.</li> <li>This is an optional field.</li> </ul>

- Click the **Save** button to return to the search screen.  
RESULT: The *Applicant Organization Financial Transactions* page appears.
- To update the applicant organization information, first search for the organization by entering the name (or part of the name using wildcards “\*”) and click the **Search** button.

Welcome **Mary Davis** of Skagway (PPQ) (Org ID 10951) [Sign Out](#)

**USDA** Phytosanitary Certificate Issuance & Tracking System (PCIT)

### Applicant Organization Financial Transactions

PCIT Home  
My Workload  
My Duty Station Workload  
Create/Update Applications  
View Certificates  
View Processed Applications  
**Financial Management**  
Print Wizard  
View Reports  
EXCERPT

All money used to pay for certificate fees should be drawn from the applicant's pre-purchase account. Manual payments (i.e., checks or money orders from the applicants) should be deposited into the applicant's pre-purchase account. Searching for the applicant organization below will allow you to update their pre-purchase account and to also charge for certificates issued outside of PCIT.

Enter the organization/applicant name (or a part of the name using wildcards “\*”) and click the 'Search' button. You may also search by Org ID. Once you search and if no matches are found, you will have the opportunity to add an account for new applicants. Click here for [search tips](#).

**IMPORTANT TIP:** You should NEVER have to create a new applicant organization account if the money being deposited is for applications submitted within the PCIT system.

Enter Organization Name:

Or

Org ID:

Organization	Location	Contact Name	Contact Number	
Sunshine Produce (Org ID 12751)	Berryville, VA		1234567892	<a href="#">Transactions</a> <a href="#">Update Org.</a>

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7. Once you locate the Organization you wish you update, click the corresponding **Update Org.** button.

RESULT: The *Update Applicant Organization* page appears.

Welcome **Mary Davis** of **Skagway (PPQ)** (Org ID 10951) . [Sign Out](#)

**USDA** Phytosanitary Certificate Issuance & Tracking System (PCIT)

### Update Applicant Organization

Please review the organization information. You may update the organization information by making changes and selecting the 'Save' button.  
Items marked \* are required.

**Company/Org. Name:**\*

**Street Address:**\*

**City:**\*

**State/Territory:**\*

**Zip Code:**\*

**Phone:**\*  **Fax:**

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8. Update the applicant organization information as appropriate and click the **Save** button to save your entry.