

CREATE A CARD SERVICES REQUEST

1. Log in to Concur, click **(+) Create** on the home page and select **Start a Request**.

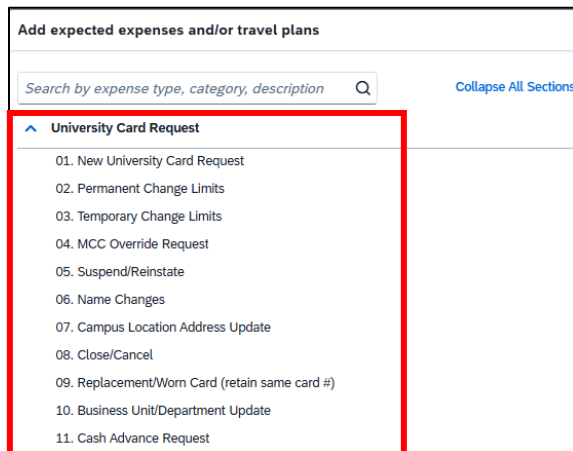
2. Select **Card Services Request** from the Request Type drop-down menu.

3. In the New Request header, enter the **Request Name**, **Request Date**, and **Card Service Request Type**.*
 - Enter your home, unrestricted cost center in the Cost Object field and select a Cost Object Approver; do not enter a restricted account such as a grant or sponsored program.
 - *Note: The Card Service Request Type you select at the header level must align with the University Card Request you select at step 5. See the table on pages 4-5 for guidance on selecting the appropriate Card Service Request Type for the desired University Card Request.

4. Select **Create Request**.

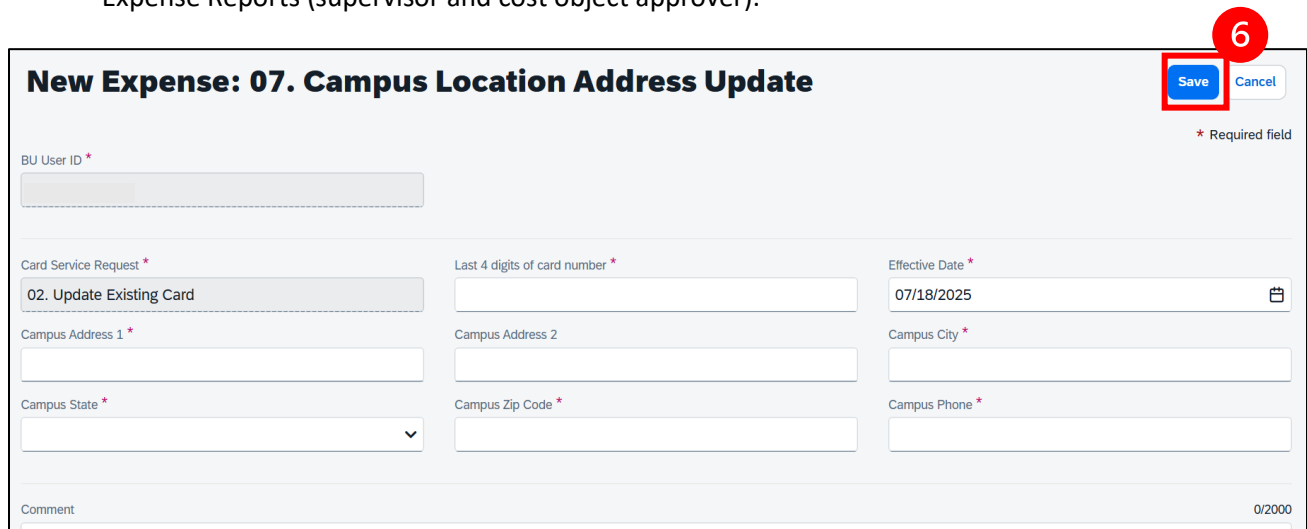
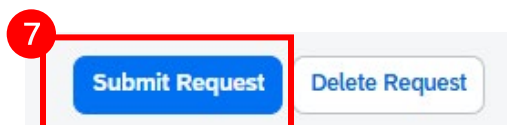


5. Click **(+) Add** and select your desired University Card Request option from the list.

6. Complete all required fields for your request and click **Save**.

7. Click **Submit Request** to send your request for approval. Requests require the same approvals as Expense Reports (supervisor and cost object approver).

Card Services Request in Concur for **BU** OneCard

Card Services Request Type (header)	University Card Request
01. New Card Request	01. New University Card Request <i>Note: After submitting the request and receiving approval for application from the financial approver, prospective cardholder must complete the training survey sent by email.</i>
02. Update Existing Card	02. Permanent Change Limits <i>Note: Must enter last 4 digits of card number in the request.</i>
02. Update Existing Card	03. Temporary Change Limits <i>Note: Must enter last 4 digits of card number in the request.</i>
02. Update Existing Card	04. MCC Override Request <i>Notes: Before submitting request, call U.S. Bank at the number on the back of your card to get the MCC code that is causing the decline. Override requests require an attachment.</i>
03. Cancel/Close/Replace Existing Card	05. Suspend/Reinstate <i>Select the appropriate Reason for Action:</i> <ul style="list-style-type: none"> - Department Change; - Lost/Stolen/Compromised Card; - No longer needed; - Noncompliance; - Return to employment; - Temporary absence - Study Abroad - Other (comment required)
02. Update Existing Card	06. Name Changes <i>Note: Name changes must be requested via HR which will update this Card Services request. You may not submit this request until the changes are represented in Concur.</i>
02. Update Existing Card	07. Campus Location Address Update
03. Cancel/Close/Replace Existing Card	08. Close/Cancel <i>Select the appropriate Reason for Action:</i> <ul style="list-style-type: none"> - Department Change; - Lost/Stolen/Compromised Card; - No longer needed; - Noncompliance; - Return to employment; - Temporary absence - Study Abroad - Other (comment required)
03. Cancel/Close/Replace Existing Card	09. Replacement/Worn Card (retain same card #) <i>Select the appropriate Reason for Replacement: Chip Malfunction; Damaged Card; Lost/Stolen/Compromised Card; Name Change; Worn Magnetic Strip</i>
02. Update Existing Card	10. Business Unit/Department Update <i>Note: Must enter last 4 digits of card number in the request.</i>
04. Cash Advance Request	11. Cash Advance Request <i>Note: Must enter last 4 digits of card number in the request and state the exact dollar amount and reason for Cash Advance.</i>