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Transition to BU OneCard

Q1. What is the BU OneCard?

A: The **BU OneCard** consolidates BU's Travel Card (TCard) and Purchasing Card (PCard) programs in a single credit card issued by U.S. Bank. **BU OneCard** holders will have either a Travel profile (TCard), a Purchasing profile (PCard), or a Purchasing + Travel (combined) profile. All **BU** transactions will automatically flow into Concur.

Q2: How do current PCard holders receive the new BU OneCard?

A: Current PCard holders were required to pick up their new **BU OneCard** on campus prior to go-live. Please see activation instructions and requirements in [this communication](#). Note: Bank of America PCards are no longer active as June 30, 2025, but access to Bank of America Works (BofA Works) will remain through October 2025 to complete outstanding transactions.

Q3: How do current TCard holders receive the new BU OneCard?

A: All TCard accounts have been migrated into the **BU OneCard** program. Current TCard holders will continue to make travel transactions using their existing U.S. Bank TCard until the card expires. One month before the current TCard expires, a new **BU OneCard** with the "Travel" profile will be mailed to the office address the TCard holder has on file with U.S. Bank. Please see additional information in [this communication](#) sent to TCard holders on June 16, 2025.

Q4: How do current dual holders (carry both a TCard and a PCard) receive the new BU OneCard?

A: Current dual cardholders (carry both a TCard and a PCard) will continue to their existing U.S. Bank TCard, which has been migrated into the new **BU OneCard** program and is to be used for both travel and purchasing transactions until the card expires. One month before the TCard expires, a new **BU OneCard** with the "Purchasing + Travel" profile will be mailed to the office address on file with U.S. Bank.

Q5: If I don't currently have a card, how do I apply for the BU OneCard?

A: To apply for a **BU OneCard**, you must submit a card request in Concur. Please follow the instructions in the [How to Request a New Card in Concur](#) guide. Once submitted, your request will require approval from your supervisor and Cost Object Approver.

Q6: What type of training is required to obtain a **BU OneCard**?

A: After submitting a [new card request](#) in Concur and receiving approval for the request, all card applicants will receive an automated email that includes the **BU OneCard** policy, mandatory training questionnaire, and instructions to activate the card. The training questionnaire must be completed with 100% accuracy.

Q7: If I currently have a PCard, how can I get permission to make travel transactions on the new **BU OneCard**?

A: To request permission to make travel transactions, create a [Card Service Request in Concur](#). At step 3, select "02. Update Existing Card." At Step 5, select "Permanent Change Limits." Then, select "Travel + Purchasing" from the Card Purpose/Usage drop-down. Once complete, click "Save" and "Submit Request."

Q8: When current TCard holders receive the **BU OneCard** upon expiration of their TCard, will they be limited to submit only through the Concur travel module?

A: All BU cardholders will have access to both travel and non-travel modules to submit non-travel and travel expense reports as appropriate depending on payment type.

Q9: Can I share my **BU OneCard** with my coworkers?

A: No, **BU OneCard** purchases may **only** be made by the cardholder themselves. Sharing the card, card number, or account details with anyone will lead to the suspension and/or cancelation of the cardholder's account.

Q10: Can I use my **BU OneCard** to book travel for someone else?

A: Yes, you can use your **BU OneCard** to book travel and accommodations for guests and students. Your **BU OneCard** should not be used to book travel for another university employee. To make travel arrangements on behalf of faculty or staff the employee will need to set you up as a Travel Arranger, and their own **BU OneCard** should be used. If they are not a cardholder they should submit an application to receive a **BU OneCard**: [How to Request a New Card in Concur](#).

Expensing and Report Types

Q11: I have traveled or incurred expenses, now how do I fill out an expense report?

A: Please follow the training for [How to Create a Non-Travel Expense Report](#) or [How to Create a Travel Expense Report](#).

Q12: Can purchasing and travel transactions be included in the same report in Concur?

A: No, Non-Travel (or typical PCard purchases) should be reconciled in a [Non-Travel Expense Report](#) in Concur. Travel-related purchases should be reconciled in a [Travel Expense Report](#) in Concur. Please refer to [this chart](#) for guidance on determining the appropriate expense report type.

Q13: If we submit card charges to multiple different accounts, should they all go in one monthly report?

A: You can allocate each line item or split your allocations to multiple accounts using the instructions in [this guide](#).

Q14: I am finding the allocations of my accommodations to be tricky, do you have any tips?

A: A shortcut for entering lodging expenses for long stays and where the nightly rate varies:

- For longer hotel stays, and especially when the nightly rate varies (e.g., higher during the week and lower on weekends), an average nightly rate can be used. Divide the total lodging expense by the number of days, then enter the start and end date of the stay and the average nightly cost on the screen for the first night; Concur will then spread the cost by day. While the system provides fields to show state and local hotel taxes separately from the room cost, this breakout is not required; taxes can be combined with lodging cost to calculate the average nightly cost. If there is a rounding issue, add the odd amount to the first night, and note in the "comment" field that average nightly cost was used.
- For accommodation costs, can the room cost and the various tax costs be combined?
 - Yes, the sum of the lodging cost and the various tax costs can be combined as a daily amount and entered in the lodging cost field. Please make sure your department does not have a policy that the costs should be split.

Q15: Will more GL codes available in Concur to choose from?

A: Yes, with the integration of the TCard and PCard, there will be an expanded list of GL codes available in Concur to reduce the need for manual journal entries. GL codes are fed over from the SAP tables. GL codes that are open for financial postings are fed over daily to Concur.

Q16: Why isn't my internal order showing up in Concur as a valid account?

A: For internal orders (i.e., funded programs) starting with 9, two leading zeros must be added. For example, what the user sees as 9090000000 in SAP, will be 009090000000 in Concur.

Q17: Are receipts required?

A: Receipts are required for travel and non-travel expenses in the amount of \$25.00 or more, and must be attached to the card transaction in Concur by the monthly posting deadline (deadlines are posted [here](#)). Receipts are required for all transactions except for Amazon Business purchases, credits, and bank fees. If you do not have a receipt, you must contact the vendor for a reprint. If the vendor will not provide a reprint, you should instead attach a memo to the transaction in Concur that details what was purchased and explains why the vendor would not provide a receipt reprint. This is essential for the auditors' records. For instructions on how to add card charges to an expense report in Concur, please click [here](#). See [How to Manage Receipts in Concur](#) for additional information.

Q18: Are both receipts and invoices required?

A: No, one document (invoice or receipt) showing proof and method of payment is sufficient for audit compliance.

Q19: Do we pay Sales Tax on purchases made with the card?

A: No, Boston University is exempt from Mass Sales Tax. Please make sure all vendors know when making a purchase online or over the phone. Tax exempt forms may be found [here](#).

Q20: Do the PCard guidelines remain the same for Non-Travel reports?

A: Yes, the existing PCard guidelines remain in effect for all Non-Travel Expense Reports submitted through the **BU OneCard** program.

Q21: Are Gift Cards allowable purchases on the **BU OneCard**?

A: Gift Card purchases are only allowable for research study participant reimbursements. They cannot be purchased with the **BU OneCard** for any other reason, and should instead be purchased using [Ariba Guided BUying](#).

Q22: Are there deadlines for submitting Non-Travel reports as there were for PCards? Do cardholders need to move transactions into the report within 30 days? Do they need to submit the Non-Travel Expense Report within 30 days?

A: The dunning process will remain in place and the 30-day submission rule still applies. Dunning notices will be sent to each individual cardholder and their supervisor separately.

Q23: I am receiving notices that my expense report is overdue, but the travel has not taken place yet. What does this mean?

A: If your travel has not taken place yet but you are being notified your expense report is overdue, it means the trip end date in the report header has been populated incorrectly. Please open the expense report, select the Details drop down, then select Report Header. You can then enter the correct trip end date. In line with policy, all expense reports must be submitted within 30 days of the last day of the trip (or within 30 days from the point of purchase if the report is for business expenses only and does not relate to travel).

If you have transactions in your profile for a trip booked in the future, they should be added to a shell report, which is to be used as a placeholder. For example: a conference will take place in June, but airfare is booked in January in order to secure the lowest rate. Once the airfare transaction feeds into your Concur profile, a shell report should be started and titled "June Conference." The Trip Start date should be set as the actual start date of the trip (i.e., June 1) and the Trip End date should be set as the day you return. Then, as more purchases are made for the conference, these transactions should be added to the shell report as they feed in to your Concur profile. This ensures that all expenses for the corresponding trip are organized and can be submitted in a timely manner and means that you will not receive notices regarding your expense report being overdue. Once the transactions are assigned to a shell report," Concur can identify that they relate to future travel as long as the start and end dates are populated correctly. As a reminder, expense reports cannot be submitted until after the actual trip or event has taken place.

Q24: How do I enter a per diem reimbursement?

A: Instructions can be found on our [How to Claim Per Diem in Concur](#) training guide. Please note that use of the per diem option, as opposed to itemized expenses with receipts, requires advance approval from an individual's financial approver.

Q25: I used my **BU OneCard** to book travel and the charge was refunded; do I need to do anything else?

A: Yes. Credit card transactions that feed into Concur cannot ever be deleted. If your **BU OneCard** is refunded, the refund will feed into Concur the same as the initial charge and will appear as a negative amount. The refund and charge must both be added to a report and then submitted. If your **BU OneCard** was charged and you are told it will be refunded, you should not submit the charge until the refund becomes available as well. The charge and refund should be submitted together in the same report to offset each other. If the initial charge was already submitted, the refund should be added to your next expense report and allocated to the same cost object as the initial charge in order to refund the same account.

Q26: Do I need to submit my refund transaction(s) in a separate report?

A: No. The initial charge and the refund can be added to an existing expense report. If you have no existing expense reports, you can follow the steps explained [here](#) for handling card refunds, or you can create a “shell report” and simply submit the report once additional expenses have been incurred.

Q27: I used my **BU OneCard** to book travel, and now I see duplicate transactions in my available expenses?

A: Please refer to the [Card Transactions vs Itineraries](#) guide. If after reviewing the guide you have determined there are in fact two duplicate card transactions, you should contact the vendor for a refund. US Bank can also be contacted at the number on the back of your card to determine that the vendor did in fact charge your card twice.

Q28: I used my **BU OneCard** but I don’t see the transaction under my available expenses.

A: Transactions can take up to ten business days to feed in to your Concur profile. Please wait for ten business days and if the charge is still not available, please submit a ticket on the [VPFA Customer Service Portal](#). Refunds can take up to a full billing cycle to feed in.

Q29: I am getting notices for unassigned transactions, but I have already submitted these expenses- what should I do?

A: Card Transactions disappear from the Available Expenses section once they are added to an expense report. In this scenario, it is most likely that these transactions were accidentally added to an expense report as Out of Pocket expenses. To correct this, the card transactions should be added to an expense report and submitted as normal- not marked as personal. A check should then be written out to Trustees of Boston University for the amount of the reimbursement received in error; a cash credit voucher should be prepared and submitted in order to refund the cost object.

Q30: Will the approval flow be the same for Travel and Non-Travel Expense Reports?

A: Yes, for both Travel and Non-Travel Expense Reports, supervisor approval is followed by the Cost Object level of approval. Cost Object Approver(s) will only be displayed once the supervisor (or “manager” as defined in the SAP organization structure) has approved the report. If the appropriate supervisor is missing from the system, please contact hrrsys@bu.edu.

Note: It is now required that you **select a specific Cost Object approver when completing the Report Header for an expense report**. You must select a name from the list that populates based on the Cost Object account to which you chose the expenses to be allocated.

- For travel reports, you select your Cost Object Approver at the header level and can also select the approver at the line-item level.

- For non-travel reports, Cost Object Approver selection occurs only at the header level. If you allocate to different accounts at the line-item level of a non-travel report and need to include additional approvers (other than the supervisor and Cost Object Approver selected at the header level), the supervisor or Cost Object Approver will be responsible for adding additional approvers.

Q31: Are Cost Object Approvers assigned in SAP? Can departments assign new Cost Object Approvers?

A: Yes, Cost Object approvers must be assigned in SAP Concur. Role assignment is necessary to ensure proper routing and approval of card requests.

Departments can request updates to the Cost Object approver role by contacting their Departmental Security Administrator (DSA). If you are unsure who your DSA is, contact Information Security at buinfosec@bu.edu.

Q32: Can staff be designated to view all department card transactions, like in the Bank of America Works system?

A: Cardholders can add delegates who can view and act on transaction. For instructions, please see the [How to Assign Expense Delegates](#) training guide.

Q34: Will approvers be able to delegate approval to others?

A: Yes, delegation is still supported. However, with the new system, multiple Cost Object Approvers can now be assigned, which may reduce the need for delegation. Please see page 3 of [this guide](#) for information about how approvers can manually add other approvers to the workflow.

Q35: What does my report status mean?

A: Active Reports have not been posted in SAP yet and can be found under the Active Reports section of the **Expense Tab**, within the account profile in which the expense report was created. (Note: if you're an Expense Delegate, you need to access the profile of the individual you submitted on behalf of). Active Report Statuses are as follows:

1. **Not Submitted** – Report has been created by user and trip has not yet occurred or report has been created but not yet completed (i.e., user is waiting for all card transactions to feed into Concur)
2. **Submitted and Pending [Supervisor's Name] Approval** – report creator has hit "Submit" and report is awaiting approval from the traveler's/individual's supervisor listed in SAP HCM
3. **Submitted and Pending Cost Object Approval** – report has been approved by Supervisor and is pending approval by the SAP FI Approver (or multiple approvers if multiple cost objects were used)

4. **Approved and in Accounting Review** – report is with the Travel and Card Services staff pending final review and processing
5. **Approved Processing Payment** – report was approved by Travel and Card Services that day and will be sent for payment that night (will appear on your budget in SAP the next day)
6. **Returned** – report has been rejected by one of the approvers. A send-back comment will appear in the report. Any requested changes must be made or further information provided; the report must then be resubmitted

Note: If you would like to determine the status of your reimbursement (i.e., whether a check has been sent), you must open a new case with Travel and Card Services in the [Financial Affairs Customer Service portal](#) and request the status by providing your report key information.

You can find the report key (6-digit number) by going to the expense report in question, clicking on the print/email tab in the report, and selecting BU Detailed Report. See further instructions for locating the report key in the [How to Find the Report Key](#) guide.

Q36: How do I find an old report that has already been sent for payment?

A: Please visit [How to Find an Approved Report](#) on the training page.

Q37: Someone asked me to do a report for them; how do I become their Expense Delegate?

A: Expense Delegates must be added by the employee requesting to have someone complete a report on their behalf; if they are unfamiliar with how to set this access up they should follow along with the step-by-step [How to Assign Expense Delegates](#) guide.

Q38: How do I reimburse a Guest or a Student?

- Only university employees have access to Concur; all Guests and Students should be reimbursed through your department's guest account.
- To request access to your department's guest account, please submit a ticket on the [VPFA Customer Service Portal](#) with the email of the guest account you are requesting access to.
- If your department does not have a guest account, you will also need to submit a ticket on the [VPFA Customer Service Portal](#), including the name of the department, the supervisor and the default cost object (this must be the department's unrestricted account). Only one guest account is allowed per department, so you will need to check with others in your department prior to sending a request.

Q39: Will Concur offer reporting tools (i.e., the ability to view spend by user)?

A: Concur's reporting capabilities are reserved for administrative users. For departmental or user-level reporting, such as tracking spend by user, please continue to use SAP Business Warehouse (BW), which remains the primary tool for financial reporting at the departmental level.

Q40: Will the Concur App still be available?

A: Yes. Please see instructions on the training page:

- [How to Register for Concur Mobile](#)
- [How to Use the Concur Mobile App \(iPhone\)](#)
- [How to Use the Concur Mobile App \(Android\)](#)

Card Requests and Limits

Q41: Can cardholders submit card requests themselves, or do they need approvers to submit requests on their behalf?

A: Yes, cardholders can submit card requests directly. The request will follow the standard approval flow based on the SAP organizational chart.

Q42: What are the card limits for the **BU OneCard**?

A: Card limits will be determined based on individual business needs. In general:

- Travel: Monthly and single-purchase limit = **\$10,000**.
- Non-travel (purchasing): Monthly = **\$30,000**; single-purchase limit = **\$3,000**.
- Travel + Purchasing: Single-purchasing limit = **\$10,000**

Q43: Can cardholders request a limit increase themselves?

A: Yes, please see instructions in the [Create a Card Service Request in Concur](#) training guide and select “Temporary Change Limits.”

Q44: For dual cardholders, are the respective credit lines for the TCard and PCard maintained or merged in some way?

A: Separate credit lines will be maintained for different purchase types (travel vs non-travel).

Q45: Will supervisors be notified that cardholders are out of compliance?

A: Yes, supervisors will continue to receive the monthly compliance report, and they will also receive dunning notices, though less frequently than the cardholders themselves. This ensures supervisors remain informed about outstanding issues while limiting the number of unnecessary notifications.

Card Declines, Replacement, and Closure

Q46: What do I do if my card is declined?

A: Before contacting Travel and Card Services, cardholders are required to call U.S. Bank (using number on the back of their card) to determine the reason for the decline. Once the reason for the decline has been obtained from the bank, the cardholder may follow up with BU Travel and Card Services if next steps are needed. **Travel and Card Services cannot assist until U.S. Bank has been contacted.**

The following are possible reasons your card has been declined:

- The transaction amount exceeds established limits;
- The transaction amount exceeds the remaining available balance of total monthly spending limit;
- The Merchant Category Code (MCC) is restricted;
- Boston University has restricted all suppliers for specifically prohibited transactions including liquor stores, airlines, rental car agencies, and ATMs by the use of the MCC which is a business classification identifier set by the banking industry. Transactions outside of the established parameters will automatically be declined at the point of sale.
- The cardholder has not activated a newly assigned or renewed card;
- The card has expired or has been terminated;
- The cardholder or the merchant transposed the card account number during the exchange of information. All cardholders should ensure that the merchant has received the correct number for the correct card to minimize the occurrence of this type of decline at the point of sale;
- The merchant entered an incorrect 4-digit security code from front of card
- PIN Change (you will be required to contact U.S. Bank for your PIN)

Q47: How do I get a replacement Card?

A: You must call US Bank, using the toll-free phone number on the back of the card. Then, when authorized to do so, you can request a replacement card through Concur Request. Please view the [Create a Card Service Request in Concur](#) guide for instructions.

Q48: What is the procedure to close out a card when an employee leaves? Should this be done by a delegate? What if no delegate is assigned?

A: Either the cardholder or their delegate can close the account. If no delegate is assigned to the cardholder, please contact Travel and Card Services for assistance.