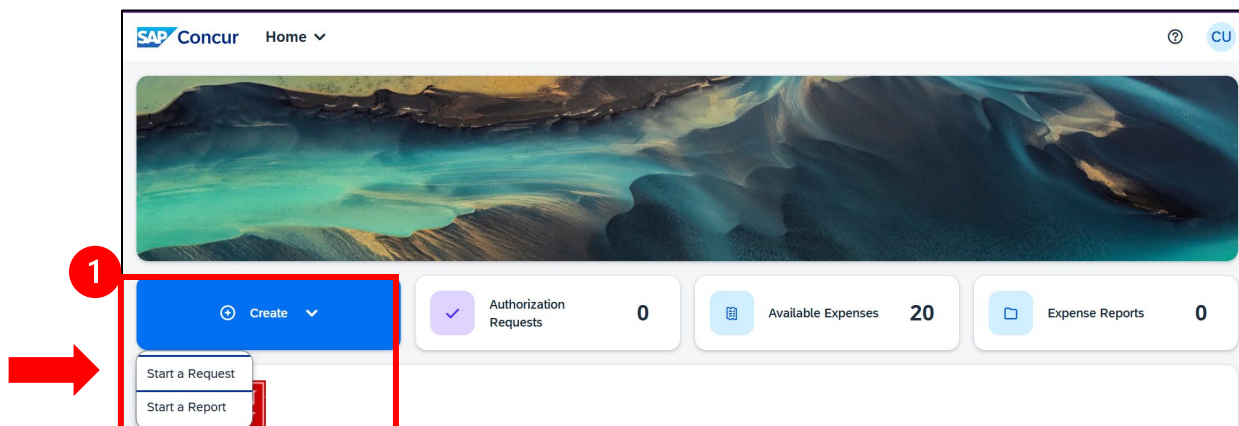
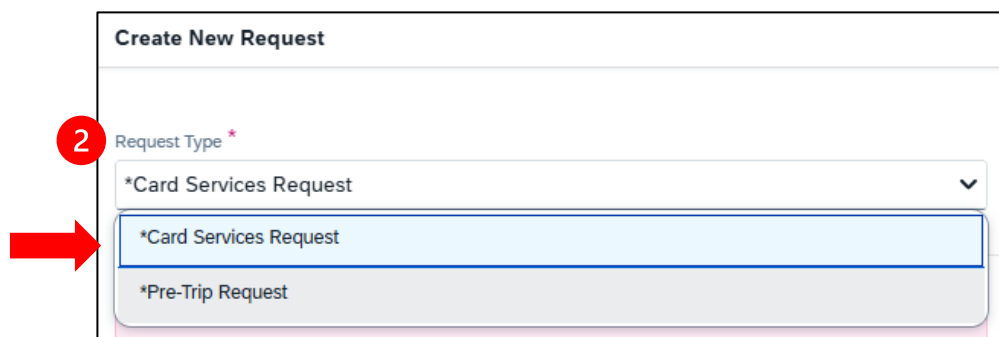


HOW TO CREATE A CARD SERVICES REQUEST

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



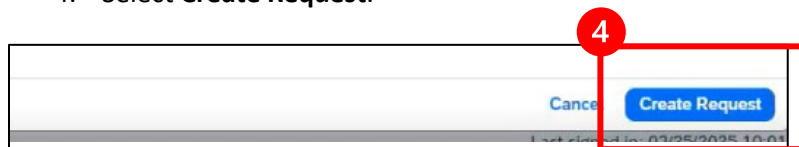
2. From the Request Type drop-down menu, select **Card Services Request**.



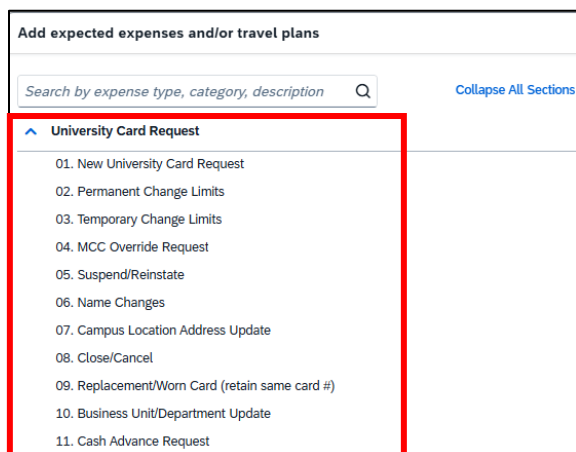
3. In the request header, enter the **Request Name**, **Request Date**, and **Card Service Request Type**.*
Select the appropriate Cost Object and Cost Object Approver (use your home, unrestricted cost center; do not enter a restricted account such as a grant or sponsored program.)

*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**.

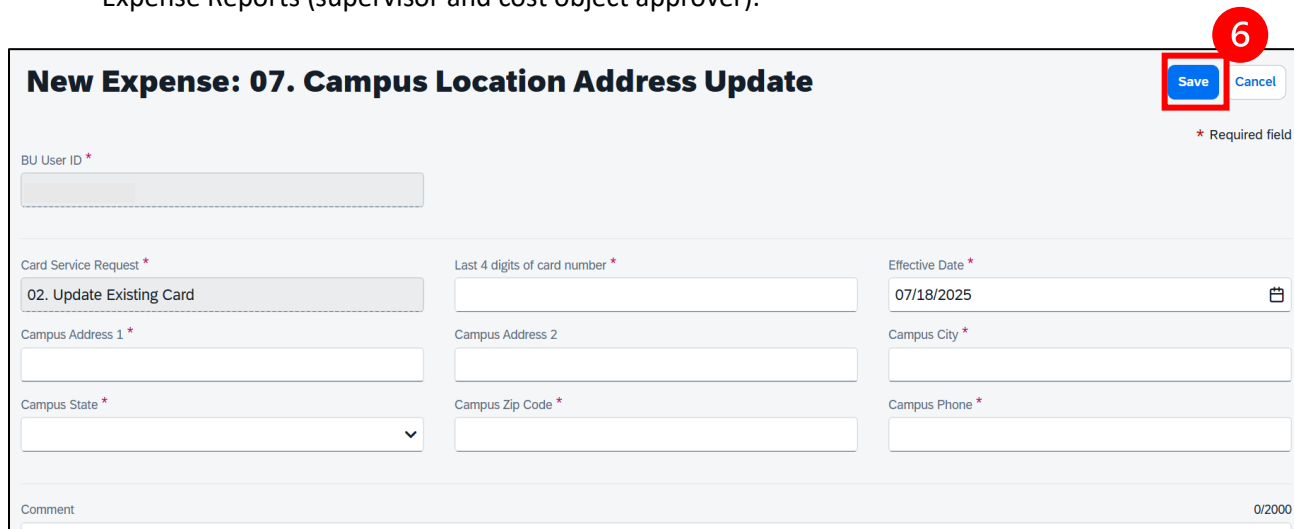
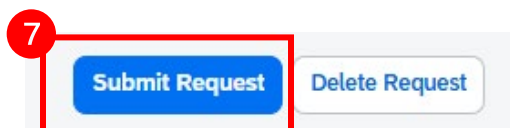


5. Click **(+) Add** and select your desired University Card Request option from the list.

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> - 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> - 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>