Hello, welcome to the Concur: New Card Request Training Video. This video will cover the process of requesting a new University Card, such as a Travel & Entertainment Card, Procurement Card, or Human Subjects Procurement Card. Before we get started, let’s briefly discuss what each card can provide for University Employees and what documentation is needed before creating a Card Request.

The Travel & Entertainment Card can be used to pay for official UC San Diego business travel expenses, or when the cardholder is acting as the host of official University-sponsored business entertainment. To apply for a Travel & Entertainment Card, you will first need to complete the Travel & Entertainment Cardholder Agreement. A link to this document can be found in the description of the video.

UC San Diego's Procurement Card is a Visa card for faculty and staff who have buying responsibilities. The card simplifies buying and paying for most routine, low-cost goods, and services under $4,999. To apply for a Procurement Card, you will need to complete the required eCourse via UC Learning, take a screenshot of the confirmation page, and complete the Procurement Card Cardholder Agreement. A link to this document can be found in the description of the video.

The Human Subjects Procurement Card can only be used to purchase compensation for participants in a study. To apply for a Human Subjects Procurement Card, you will need to complete the cardholder agreement, cardholder addendum, current IRB form and consent form. A link to the agreement and the addendum can be found in the description of the video.

Once you have the required documentation, you are ready to submit your Request via Concur. If you are acting on behalf of another employee user, please ensure to act as their Delegate before starting this process. Refer to our Delegates Knowledge Base Article for further information. From the Concur homepage, select the Requests module at the top of the screen. Select New Request. For the Request Type, be sure to choose Card and Payment Products Request to load the appropriate form fields. Enter in today's date and a document name that makes sense for you and your department. For User Type, select whichever of the three options apply to the cardholder.

For Payment Product type, ensure to select the card product that you wish to apply for. You may only apply for one card at a time. Choose the desired card product (UCSD Human Subjects Procurement Card, UCSD Procurement Card, or UCSD Travel & Entertainment Card). Proceed to enter in a Fund, Financial Unit, Approver, and Function. If you are not sure what to enter in for this information, please reach out to your Fund Manager or Financial Unit Approver.

Do not enter a Project, Task, or Funding Source value in the Request. These transactions do not post to PPM or the General Ledger - therefore they are not necessary. Add in a valid business purpose where indicated. Next, select the Expenses tab. This is where you will
provide additional details for the specific Request. From the menu on the right-hand side, select **New Card**. Your Expense Type and Payment Product Type will automatically populate. Enter in your Mail Code and any comments for anyone approving this document. Please refrain from entering in any Personal Identifiable Information (PII), such as a home address. Select **Save**.

Next, you will need to attach the required documentation, as discussed in the beginning of this video. The required documentation depends on which card product you are creating the Request for. Select **Attachments** and follow the prompts to attach your document. Ensure that no PII is included on any attachments as well.

After attaching the proper documentation, you are ready to submit your New Card Request. Select **Submit Request** and follow the prompts to finalize submission.

Once your New Card Request has been submitted, it will go through the approval flow. For Travel & Entertainment Cards, the Request will go to the Financial Unit Approver listed on the Request Header before going to IPPS for processing. For Procurement Cards and Human Subjects Procurement Cards, the Request will go to the Financial Unit Approver and a Department Head for that Financial Unit before reaching IPPS for processing.

Thank you for watching the Concur: New Card Request training video. I hope that you have found this video helpful and informative. Do not hesitate to contact us via Services & Support with any questions. It would be our pleasure to answer any questions about this content. Have a wonderful day.