



Requesting a New Travel or PCard

Scope and Purpose

This guide is intended for all TCU employees who want to have a Procurement and/or Travel Card and have access to Concur. This guide provides detailed information on how to request one through Concur, as well as the additional steps outside of Concur. All links within this guide are clickable, including interior navigation.

Definitions

Travel Card

This type of card is designed for travel and food, and allows purchases with vendor types such as hotels, restaurants, grocery stores and car rental agencies. Services are not permitted on any University Cards. Deposits, except for non-group hotel and car rentals, are not permitted on a Travel Card.

When requesting a travel card, cardholders have the option of saying yes to Entertainment (called a Travel & Entertainment, or T&E), which grants access to an additional limited group of entertainment venues such as museums, golf courses and movie theatres. Specific business justification must be provided to be eligible for this card type.

Procurement Card

A type of card designed for the purchase of physical goods, this card will work at most retail stores. It will not work at food places, as that is a travel card expense. Services are not permitted on any University Cards.

One Time Limit

This type of limit sets the maximum amount a cardholder is allowed to spend in a single transaction. The standard one-time or transaction limit is \$2500.00.

Overall Spending Limit

This type of limit sets the maximum overall amount a cardholder is allowed to spend each month. Transactions are cleared from your Concur profile once an expense report is filed and fully processed in Concur. Your monthly balance resets to zero at the beginning of each month.



Process Overview

This section gives a quick overview without screenshots, if you just need a reminder of where to find the request.

Step 1: Complete the Training

Complete the online training for Cardholders. Read and understand the University Credit Card Policy.

Step 2: Create a Request in Concur

Create a request in Concur, choose TCU Card Request and Updates, then select “new card.”

Step 3: Add Card Type to Report

Once in the report, add an expense to your report and choose either Travel Card or PCard. Complete the applicable fields and click save. T&E cards must use one of the options from the justification drop down.

Step 4: Attach Agreement and Submit Report

Attach your signed cardholder agreement to the report and hit submit.

Step 5: Complete the Online JP Morgan Application

You will receive a link via email from the Coordinator of Procurement and Travel Cards, inviting you to complete your registration online with JP Morgan. You must complete it to receive a card.

Step 6: Receive Your Card

Once your card arrives, you will be notified. Pick up your card using your preferred method and activate it using the last 4 digits of your employee ID number.



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Step by Step Guide

Step 1: Complete the Online Training

Access the [Card Compliance Training](#) online and complete the training.

Read and understand the [University Credit Card Policy](#) found online.

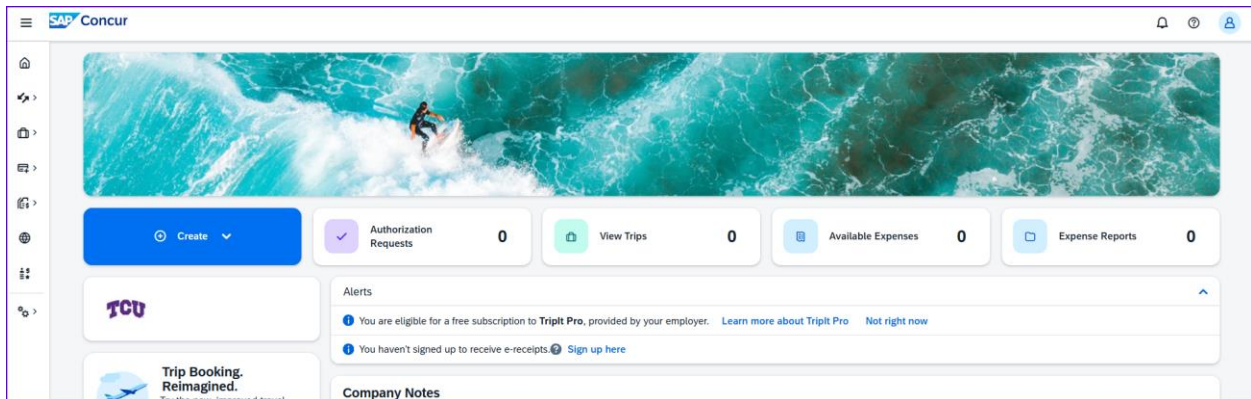
Read, understand, and sign a copy of the [University Credit Cardholder Responsibility Agreement](#) found online.

Step 2: Access Concur

Navigate to your Concur profile through [MyTCU](#), [tcu.okta.edu](#), a saved web link, or links found on TCU's Procurement webpage.

Log in with your SSO if prompted. Your home page should look something similar to this.

Interior navigation is found via icons on the left-hand side, or through the large tiles under the picture header.

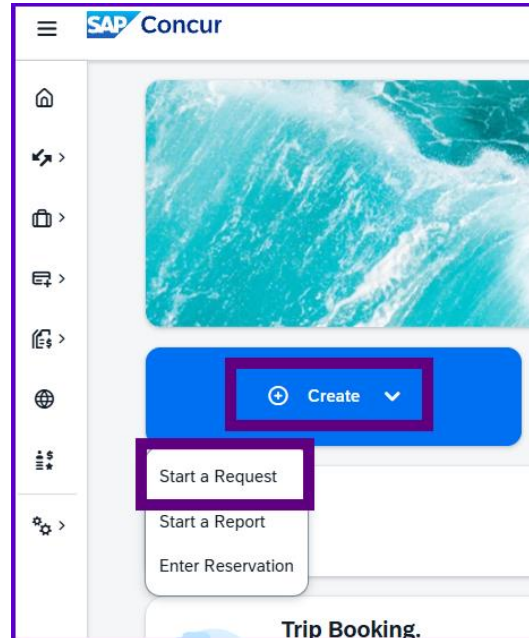




Step 3: Create a New Request

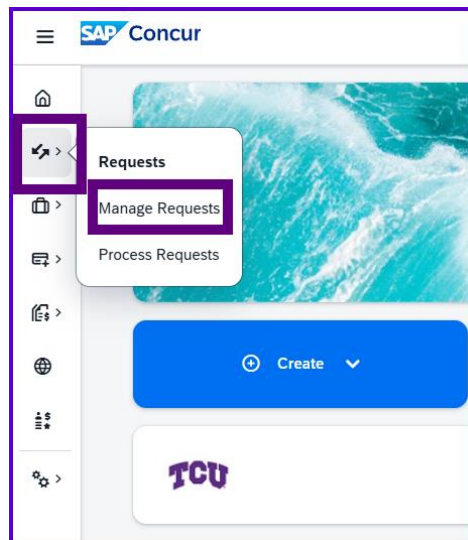
Method 1: From the Homepage

From your home page, click on the blue “create” button, and select “start a request.”



Method 2: Navigate through Manage Requests

Click on the double arrow icon on the left-hand side, and click on Manage Requests.



Once the page loads, click on Create New Request in the upper right-hand corner.



Step 4: Fill in the New Request Details

The screenshot shows the 'Create New Request' form. It includes a title bar, a 'Request Type' dropdown (Item 1), a 'Card Request Description' text field (Item 2), a 'Card Request Type' dropdown (Item 3), a 'Completed University Credit Card Compliance Training?' dropdown (Item 4), a 'Business Unit' dropdown (Item 5), a 'Fund' dropdown (Item 5), and a 'Department' dropdown (Item 5). Below these is a 'Comment' text area. At the bottom right is a 'Create Request' button (Item 6) and a 'Cancel' button. A legend indicates that an asterisk (*) denotes a required field.

Item 1: Request Type

Select “TCU Card Request and Updates” in the box labeled 1. This will change all the field names and tell Concur that you are doing a request related to a card.

Item 2: Card Request Description

Enter a TITLE into this field for your request. Common titles include “New Card Request”, “New TCard”, or “New PCard”, with your last name.

Item 3: Card Request Type

Select “01.New Card” for item 3. This will tell Concur you are requesting a brand-new card, and not something else.

Item 4: Training

Always select “yes” to indicate you have completed the University training.

Training [can be found here](#).

[Refer to Step 1](#) for more information.

Item 5: Unit Information

If this information is not auto-filled, complete this section according to the unit you are assigned to or making the purchases for. Your default settings at your profile level flow down to your requests, and should be completed before submitting your request.

Item 6: Create Request

Review the information you have entered for accuracy, and then click on Create Request in the bottom right-hand corner.



Step 5: Add an Expense

You have now created a report to request a new card, but have not submitted it. The next step is to tell the report what kind of new card you would like to request.

Step 1: Add an Expense

Click the +Add button in the upper right-hand corner underneath Submit Request.

Step 2: Select New PCard or New Travel Card Request

In the dialogue box that opens, select one of the following: New PCard Request or New Travel Card Request.



Step 6: Travel Card Requests

Travel cards are designed for travel purchases, and food on and off-campus. Complete the dialogue box that pop ups accordingly.

Needed by Date * 12/15/2025

Employee First Name * Mary Grace

Employee Last Name * Held

Will you be using the card at Entertainment venues? * No

Card Limit Options (Single Transaction / Monthly Limit) * 01. Standard \$2,500 / \$2,500

Custom Single Transaction Limit Requested \$

Custom Monthly Limit Requested \$

T&E Business Justification * None of the above

Limit Business Justification * Standard limit of \$2,500 requested

Is this card request related to any of the following? * None of the above

Additional Information 0/2000

Save Cancel

6a: Needed by Date

Enter the date you need your card. A recommended date is two weeks in the future, to allow time for the initial request to be processed, an online application with JP Morgan to be completed, and the new card to arrive.

6b: Employee Name

Your name is automatically populated based on your legal name provided by HR. When you complete your application via JP Morgan, this name is what should be entered. If your name is incorrect in Concur, please contact HR.

6c: Entertainment Venues

Standard Travel Card: Select No

Travel & Entertainment Card: Select Yes, and provide justification.

The question “Will you be using the card at Entertainment venues?” applies to Travel & Entertainment cards, versus the standard Travel cards. This card subtype grants access to a short list of additional MCCs, such as golf courses, museums and movie theatres. One of the business justifications provided under “T&E Business Justification” must be provided to be eligible for this card type. A standard travel card works for food purchases at restaurants and grocery stores for the purposes of entertainment.



6d: Card Limit Options

The standard Travel Card limit for overall balance is \$2500.00. If your unit has higher purchase needs, you may select Custom Limit and enter that information in the two boxes next to Item 5.

6e: T&E Business Justification

Standard Travel Card: Select “None of the above”

Travel & Entertainment Card: Select one of the other justifications. If none apply, please select “None of the above” and change 6C to “no” for a standard travel card.

6f: Limit Business Justification

Standard Limit: Select “Standard limit of \$2,500 requested”

Non-Standard Limit: Select one of the other justifications

6g: Other Situations

Answer the final question, as it applies to your position. This is informational for the Card Program Administrator. If you are a Graduate Assistant, please designate two delegates to be assigned in Concur in the box “Additional Information.”

6h: Additional Information

Enter any additional information you wish in this box.



Step 7: PCard Requests

If you are not requesting a new PCard, skip to [Step 8](#).

PCards are designed for purchasing tangible goods, such as office and non-food event supplies. After selecting New PCard Request, complete the following dialogue box:

The screenshot shows a web form for requesting a new PCard. It includes fields for 'Needed by Date' (12/15/2025), 'Employee First Name' (Mary Grace), 'Employee Middle Name' (empty), and 'Employee Last Name' (Held). There are sections for 'Card Limit Options' with a dropdown set to '01. Standard \$2,500 / \$2,500', and input fields for 'Custom Single Transaction Limit Requested' and 'Custom Monthly Limit Requested'. A 'Business Justification for New Card' section has a text area with 'Standard limit requested' and a character count of 24/64. An 'Additional Information' section at the bottom has a large text area and a character count of 0/2000. 'Save' and 'Cancel' buttons are at the bottom left.

7a: Needed by Date

Enter the date you need your card. A recommended date is two weeks in the future, to allow time for the initial request to be processed, an online application with JP Morgan to be completed, and the new card to arrive.

7b: Employee Name

Your name is automatically populated based on your legal name provided by HR. When you complete your application via JP Morgan, this name is what should be entered. If your name is incorrect in Concur, please contact HR.

7c: Card Limit Options

Standard PCard Limits are \$2,500.00 for both single amount and overall limits.

Single purchases for tangible goods greater than \$2,500.00 must be completed in Jaggaer. If your unit needs a PCard with an overall limit greater than \$2,500.00, please reach out to the Card Program Administrator to discuss your unit's need.

7d: Business Justification

Enter information in this box appropriate for your position and business needs.



Step 8: Sign and Attach a Card Holder Responsibility Form

The Cardholder agreement can be found via [this link](#).

Download, sign, and save the document using your preferred method if you have not already done so. Once you have returned to the report, click on Attachments in the upper left-hand portion of the report, and attach the file.

New Card Request
Not Submitted | Request ID: 4M4K

Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

Attach Documents

Step 9: Review Details and Submit

Review the details of the report to ensure accuracy. Check for Alerts at the top and ensure there are no errors. Click on Submit Request.

Home / Requests / Manage Requests / New Card Request

Alerts: 2

New Card Request
Not Submitted | Request ID: 4M4K

Request Details ▾ Print/Share ▾ Attachments ⚠ ▾

Submit Request Copy Request Edit Approval Flow Delete Request

EXPECTED EXPENSES

Expense type↑	Details↑	Date↑	Amount↑	Requested↑
<input type="checkbox"/> 02. New Travel Card Request	Test	06/26/2025		

Step 10: Complete a JP Morgan Account

The first step to receiving a Travel and/or Procurement card is to request one through Concur. After your request is fully approved, you will receive an email link from the Card Coordinator to create an account with JP Morgan.

Complete the online registration according to the instructions in the email. You will not receive a card until you complete this step.



Step 11: Receive and Activate your Card

Your card will be mailed to the TCU Card Program Coordinator in the Harrison building, and you will be sent pick-up instructions once it has arrived.

After you receive your card, activate it immediately either online at ccportal.jpmorgan.com or by calling 1-866-602-8170. You will use the last 4 digits of your employee ID to activate your card.

Once your card is activated, you can begin making purchases according to university policy.

Resources

[Concur Travel & Expense Page](#) – Information regarding expenses and traveling

[University Card Programs](#) – University page including Travel and PCard Guides

[Card Compliance Training](#) – University training for card compliance

concur@tcu.edu – Support for Concur and purchasing cards

itpurchasing@tcu.edu – Support for software and online data platform purchases

contract_questions@tcu.edu – Support for contracts with vendors

JP Morgan Cardholder Support - 800-316-6056

International Cardholder Support 1-847-488-3748

JP Morgan Claims Support – 800-895-7074

Fraud Alert Text Messages - [Sign Up Website](#)