



Requesting a Limit Increase

Scope and Purpose

This guide is intended for all TCU Procurement and/or Travel Card holders with access to Concur. This guide provides detailed instructions on how to request a temporary purchasing limit increase. Requests can be made to increase your overall card limit for the duration of the request, or to raise the single transaction limit if a high-dollar purchase is being blocked despite sufficient available balance.

Definitions

Card Limit

The overall maximum balance your corporate Travel or PCard can hold at any given time.

Transaction Limit or Single Use limit

The maximum allowable amount for a single point of sale transaction at any given time.

Process Overview

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

Step 1: Create a Request in Concur

Access Concur using your preferred method, and create a request. Choose TCU Card Request and Updates, and select “change to existing card.”

Step 2: Add an Expense to Report

Add an expense to your report, and choose item number 4- “MCC Change or Limit Change,” and complete the applicable fields in the dialogue box that pops up. Click save once all the fields are complete.

Step 3: Submit Report

Submit the report.



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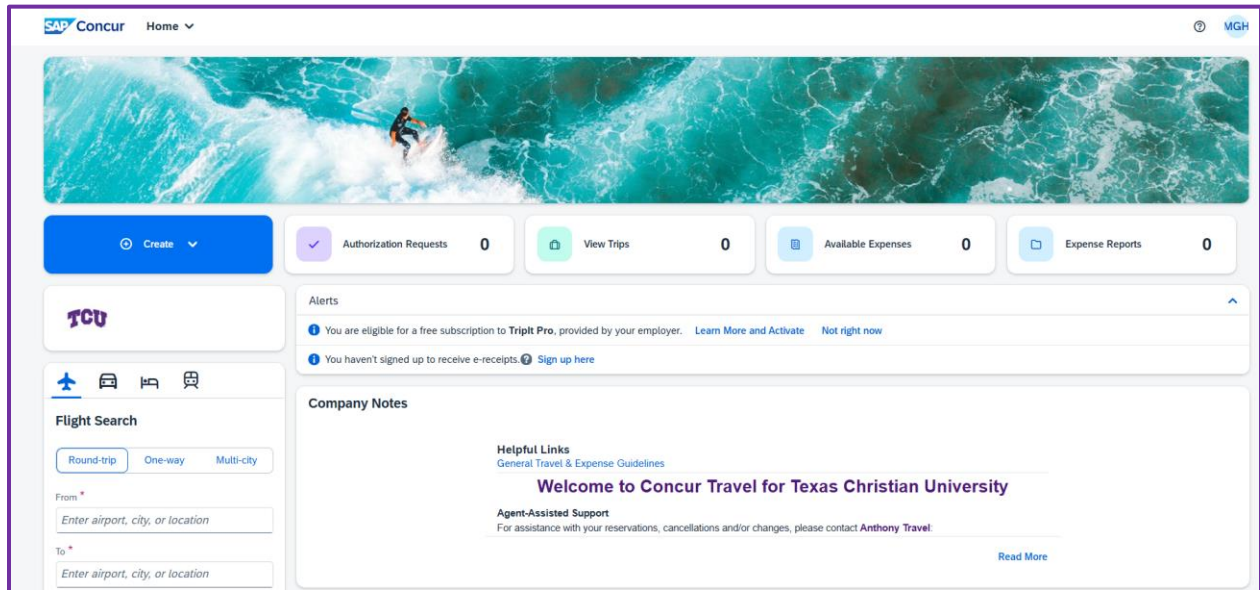


Step by Step Guide

Step 1: Access Concur

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

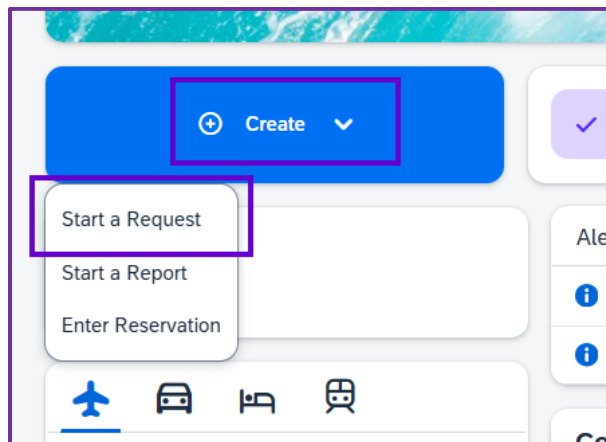
Log in with your SSO if prompted. Your home page should look something similar to this.



Step 2: Create a New Request

Method 1: From the Homepage

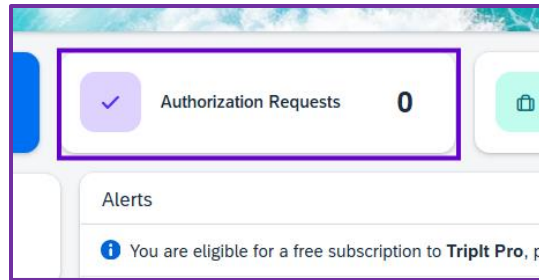
From your home page, click on the blue “create” button, and select “start a request.”



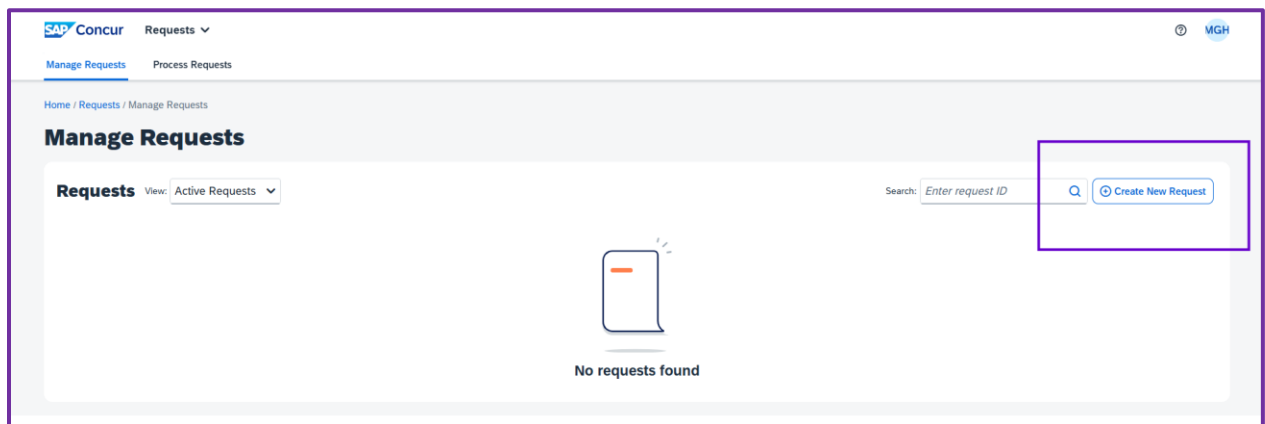


Method 2: Navigate through Manage Requests

Click Authorizations Requests.



Then click on Create New Request in the upper right-hand corner.





Step 3: Fill in the New Request Details

A new dialogue box will open after you click on Create New Request.

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 your card.

Item 2: Card Request Description

Enter a TITLE into this field for your request. Common titles include “Temporary Limit Increase,” your name followed by “Limit Increase,” and “Single Item Limit Increase”.

Item 3: Card Request Type

Select “Change to existing card” for item number 3. This will tell Concur you want to update your current card, not request a new one or cancel your existing card.

Item 4: Training

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

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 purchase for.

Item 6: Create Request

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

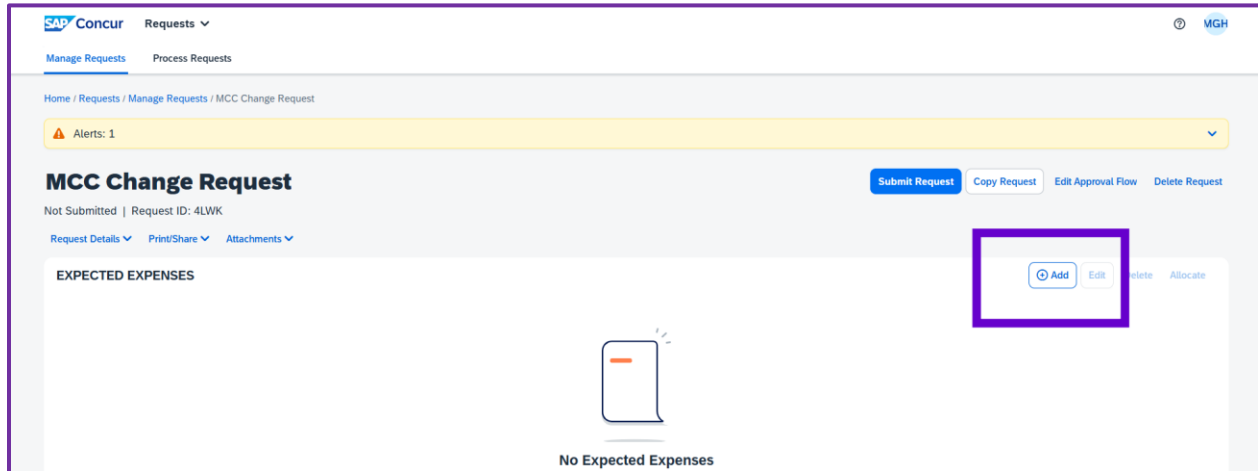


Step 4: Add an Expense

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

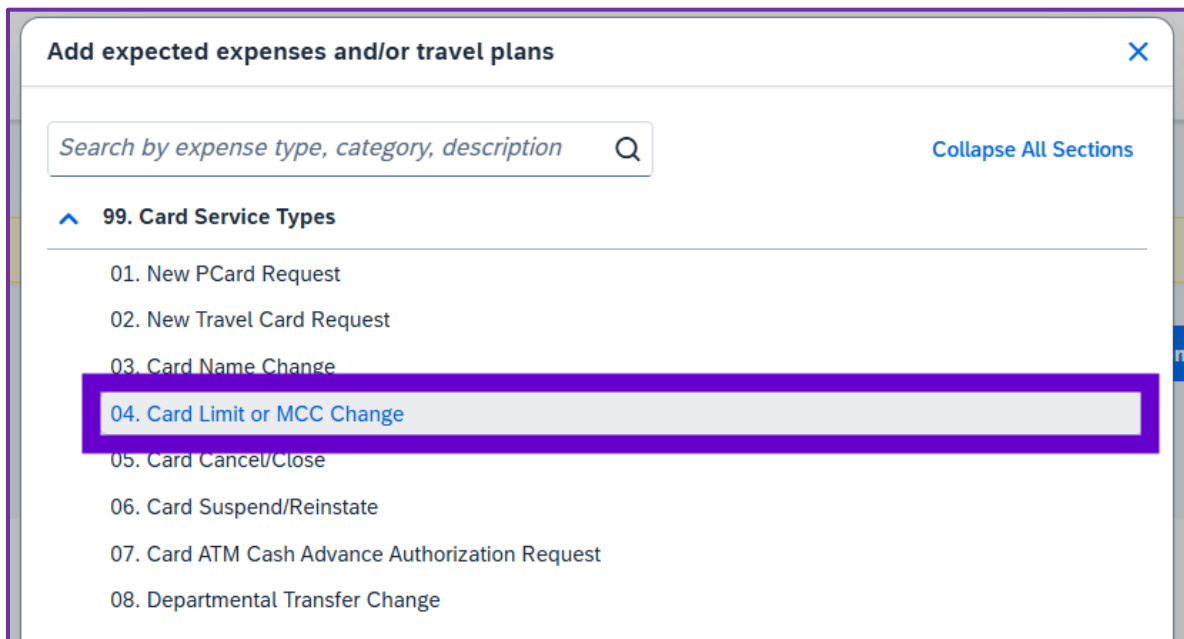
Item 1: Add an Expense

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



Item 2: Select Card Limit or MCC Change

In the dialogue box that opens, select item number 4: Card Limit or MCC Change.





Item 3: Card Type

Select either Travel Card or PCard, depending on the type of card you need your limit request for.

NB: If you have both a PCard and a Travel card, your selection here will be the card the limit change is applied to. It will NOT carry over to both cards.

The screenshot shows the SAP Concur interface for a 'New Expense: 04. Card Limit or MCC Change' request. The form includes the following fields:

- Item 3: Card Use Type**: A dropdown menu.
- Item 4: Card Change Requested**: A dropdown menu.
- Item 5: Time Span of Change Requested**: A dropdown menu.
- Item 6: Change Needed by Date**: A date input field with a calendar icon.
- Item 7: Temporary End Date**: A date input field with a calendar icon.
- Item 8: Business Justification for Change**: A text area.
- Item 9: Enter Amount or MCC Needed**: A text input field.
- Item 10: Save/Cancel buttons**: Two buttons at the bottom left.

Item 4: Change Requested

Select Limit Increase in this box to indicate you need one.

NB: If you are also requesting an MCC Change Request at the same time, you will add another expense to this report and repeat items 1 through 3, and select MCC for item 4.

Item 5: Choose Temporary

ALWAYS choose temporary for the box labeled Item 5.

Item 6: Need By Date

Select a date you need the change completed. This date can be in the future.

NB: Look ahead as much as possible with your purchases, and allow time for your financial approvers to process your request. When processed, if the need-by date has already elapsed, the change request will begin on the date it is processed.



Item 7: End Date

Enter an end date for the Limit Change request as applicable to your situation. There is no standard time frame for increases to limits. Some things to keep in mind when determining your requested end date:

- Overall amount(s)
- If this is a one-time purchase, or a series of purchases related to travel
- If additional expenses are expected or suspected between the time of the limit increase and the reconciling of the expense(s)

Item 8: Reasoning

This field is designed to indicate to TCU why you need your limit increased. Enter as much detail as possible that will indicate to your approvers why this expense is needed.

Item 9: Transaction Details

Enter into this box as much detail as you can provide. If you have a dollar amount and vendor information, that is helpful. Enter specifically if this needs to be a Single Transaction Limit increase, an overall card limit increase, or both.

NB: If this is a technology, software, or online data platform purchase, please indicate if IT has pre-approved the purchase. Email itpurchasing@tcu.edu with questions and requests.

NB: If this is a purchase that requires a contract, please provide the contract provisions as approved by University Contracts. Email contract_questions@tcu.edu with questions and requests.

The screenshot shows the SAP Concur interface for a 'New Expense: 04. Card Limit or MCC Change' request. The form is titled 'New Expense: 04. Card Limit or MCC Change' and includes a 'Save' button and a 'Cancel' button. The form is divided into several sections, each labeled with an item number in a purple box:

- Item 3: Card Type**: A dropdown menu for 'Card Use Type'.
- Item 4**: A dropdown menu for 'Card Change Requested'.
- Item 5**: A dropdown menu for 'Time Span of Change Requested'.
- Item 6**: A date field for 'Change Needed by Date' with a calendar icon.
- Item 7**: A date field for 'Temporary End Date' with a calendar icon.
- Item 8**: A text area for 'Business Justification for Change'.
- Item 9**: A text area for 'Enter Amount or MCC Needed'.
- Item 10**: A 'Save' button and a 'Cancel' button.

Item 10: Save

Review the information entered to ensure accuracy, and then click save at the bottom OR the top.



Step 5: 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](#) / MCC Change Request

Alerts: 1

MCC Change Request

Not Submitted | Request ID: 4LWK

[Request Details](#) [Print/Share](#) [Attachments](#)

Submit Request

Copy Request

Edit Approval Flow

Delete Request

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

<input type="checkbox"/>	Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>		04. Card Limit or MCC Change	Example Justification	06/20/2025		



Reviewing Status

Once you have submitted a request, you can view the status of its approval at any time by navigating to the report found under Manage Requests.

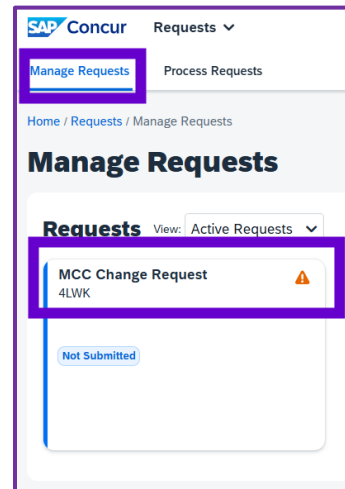
Ensure the report says **SUBMITTED** in green.

Reports that have been approved will say **APPROVED** in green.

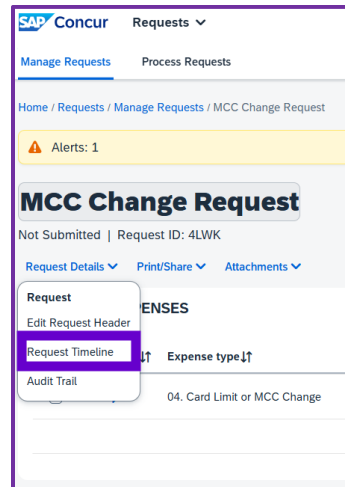
Submitted

Approved

Click on the request you want to view.



Once you enter the report, select Request details in the upper left, and click on Request Timeline to view which step it is at.





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

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