



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.

Definitions

Travel Card

This type of card is designed for travel and allows purchases with vendor types such as hotels, restaurants, and car rental agencies. When requesting a travel card, cardholders have the option of including an expanded Entertainment group of merchants, such as grocery stores and wholesale clubs, such as Costco or Sam's.

Procurement Card

A type of card designed for the purchase of physical goods, this card will work at most retail stores.

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 before submitting an expense report. Transactions are cleared from the spent balance, and the available balance is restored once a report is filed and fully processed in Concur for those transactions.



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.

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.

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.

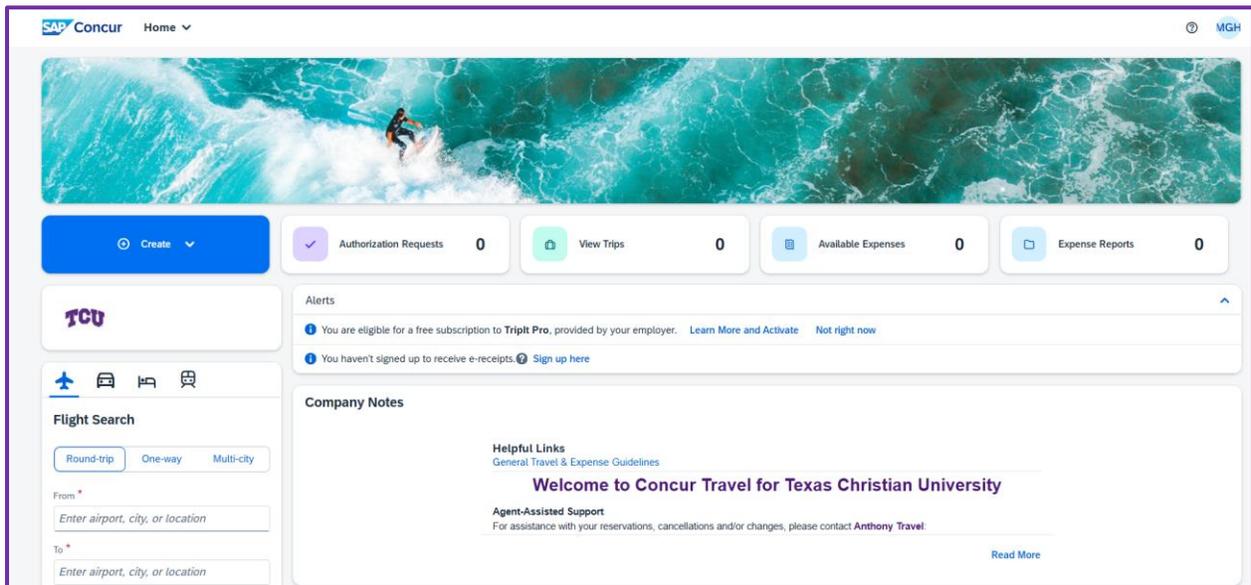
Read, understand, and sign a copy of the [University Credit Cardholder Responsibility Agreement](#) found online.

For PCards, review and understand the [guidelines from Appendix A](#), and for Travel Cads, review and understand the [guidelines from Appendix B](#).

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.

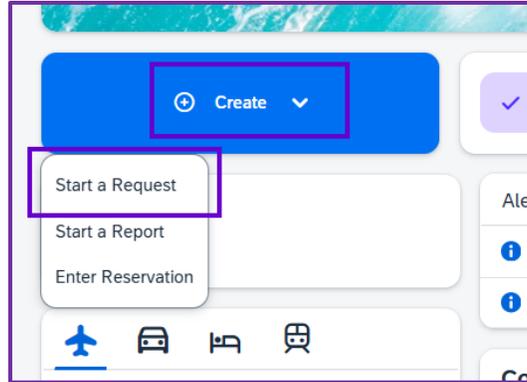




Step 3: Create a New Request

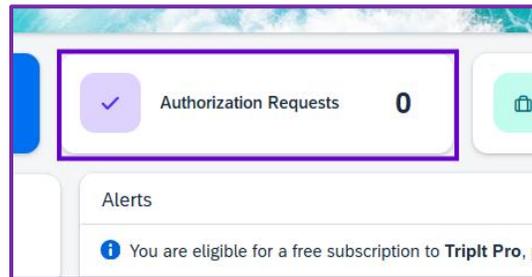
Method 1: From the Homepage

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

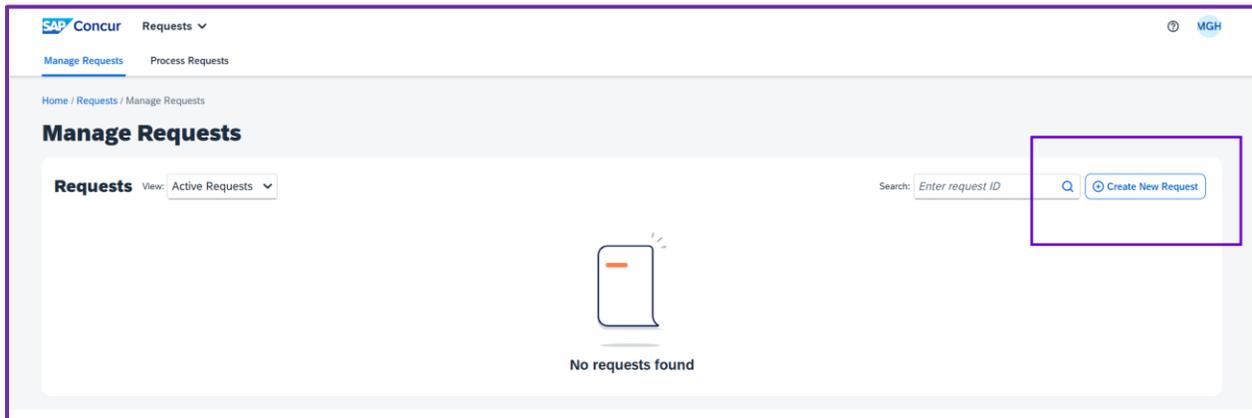


Method 2: Navigate through Manage Requests

Click Authorizations Requests.



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





Step 4: 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 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”.

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.

Item 6: Create Request

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

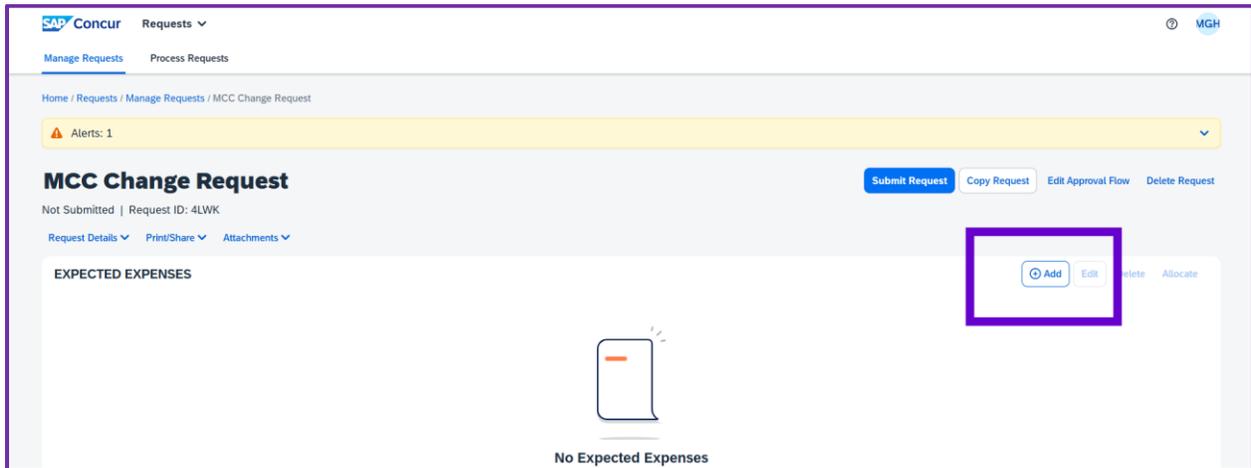


Step 5: Add an Expense

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.

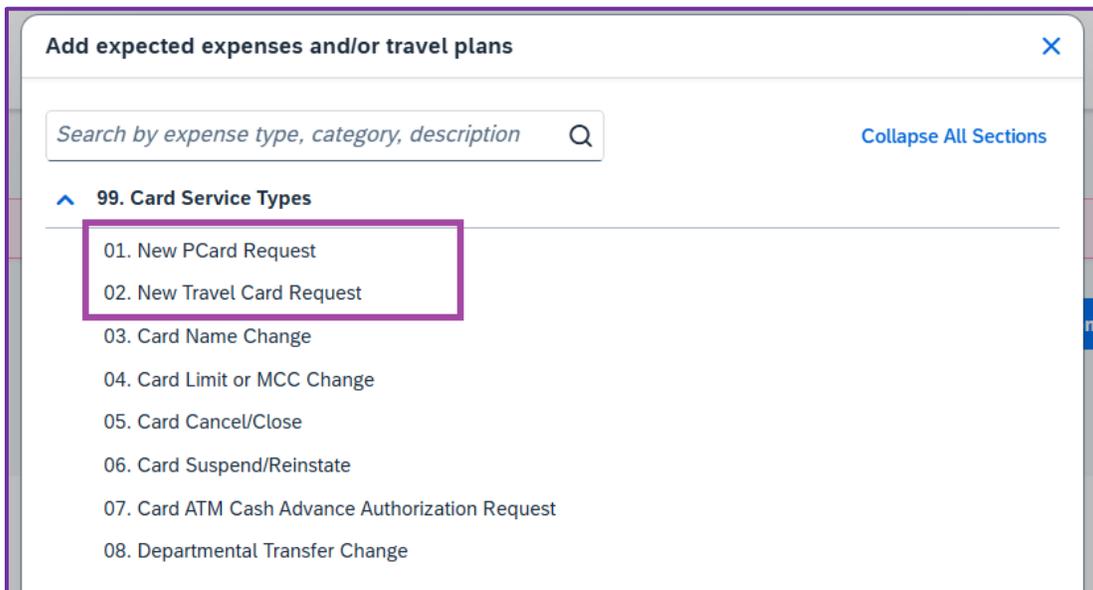
Item 1: Add an Expense

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 one of the following: New PCard Request or New Travel Card Request.





Item 3: 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.

The screenshot shows the SAP Concur interface for a 'New Expense: 02. New Travel Card Request'. The form includes several fields and sections:

- Item 3:** 'Needed by Date' field with a calendar icon and a placeholder 'MM/DD/YYYY'.
- Item 4:** 'Will you be using the card for Entertainment expenses?' dropdown menu.
- Item 5:** 'Card Limit Options (Single Transaction / Monthly Limit)' dropdown menu.
- Item 6:** 'Business Justification' text area with a character count of 0/64.
- Item 7:** 'Save' and 'Cancel' buttons in the top right corner.

Other visible fields include 'Employee First Name' (Mary Grace), 'Employee Middle Name', 'Employee Last Name' (Held), and 'Custom Single Transaction Limit Requested'.

Item 4: Entertainment – Travel Card ONLY

If you are requesting a travel card, you will be prompted with a question: “Will you be using the card for Entertainment expenses?” Answer yes or no, as applicable.

This close-up shows the 'Will you be using the card for Entertainment expenses?' dropdown menu, which is highlighted with a purple box and labeled 'Item 4'. Below it is the 'Custom Monthly Limit Requested' field with a '\$' symbol and a character count of 0/2000.



Item 5: Card Limit Options

The standard PCard and Travel Card limit for both single transactions and 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.

A screenshot of a web form showing a dropdown menu for 'Card Limit Options (Single Transaction / Monthly Limit)'. The dropdown is open, and 'Item 5' is highlighted in purple. The background is a light gray.A screenshot of search results for 'Card Limit Options (Single Transaction / Monthly Limit)'. A search bar contains 'Search by Text'. Below the search bar, two results are listed: '01. \$2,500 / \$2,500' and '02. Custom Limit'. The '02. Custom Limit' option is highlighted in purple.

Item 6: Business Justification

Enter a business justification for why you need to have a Travel or Procurement Card. Oftentimes, this is simply your position's need to travel or make purchases based on your essential duties.

A screenshot of a web form showing a 'Business Justification' field. The field is highlighted in purple and contains the text 'Item 6'. Above the field is a 'Custom Monthly Limit Requested' field with a dollar sign. To the right of the 'Business Justification' field is a character count '0/64'. Below the field is an 'Additional Information' field.

Item 7: Review and Save

Review all of the information entered, and click Save if everything is correct.

A screenshot of a web form showing 'Save' and 'Cancel' buttons. The buttons are highlighted in purple. Above the buttons is a box containing the text 'Item 7'. Below the buttons is a red asterisk and the text '* Required field'.

Step 6: 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.

A screenshot of a web page titled 'New Card Request'. The page shows 'Not Submitted | Request ID: 4M4K'. There are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. The 'Attachments' dropdown is open, showing an 'Attach Documents' button. The 'Attach Documents' button is highlighted in purple. Below the dropdowns is a section titled 'EXPECTED EXPENSES'.



Step 7: 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

Add Edit Delete Allocate

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

Step 8: 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 9: 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.



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.

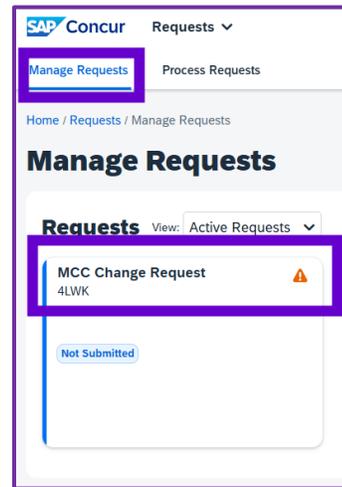
Ensure the report says **SUBMITTED** in green.

Submitted

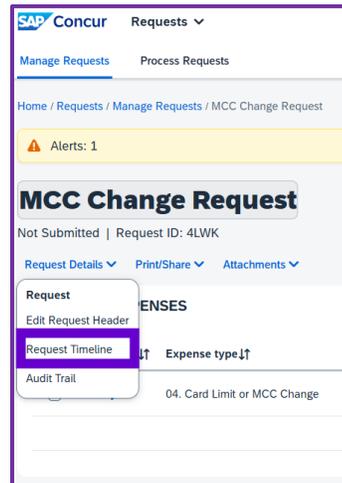
Reports that have been approved will say **APPROVED** in green.

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](#)