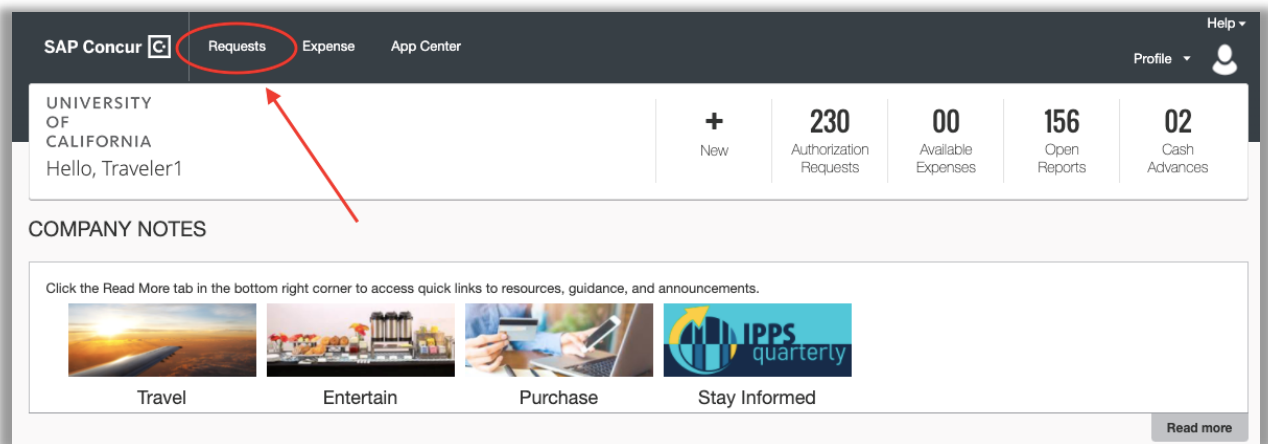


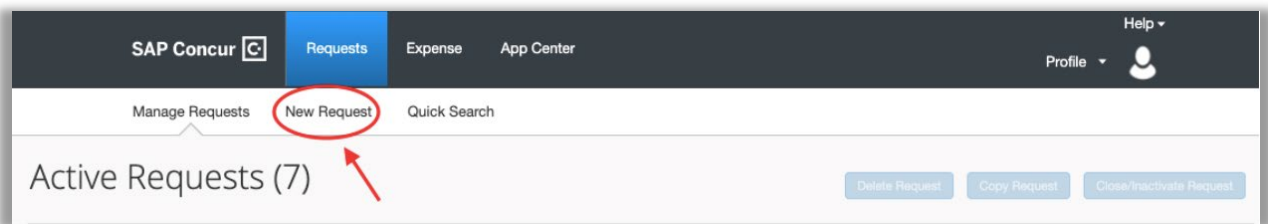
How to Request a New P-Card Student Life

Steps to Take

1. Log into [Concur](#) using your Single Sign-On
2. Click on the **Requests** module at the top of the page, the Requests module homepage will display



3. Select **New Request** from the Task Bar



4. The **New Request** page will display

The screenshot shows the SAP Concur 'New Request' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'App Center'. The main header has 'Manage Requests', 'New Request', and 'Quick Search'. The page title is 'Request' and the status is 'Not Submitted'. The 'Business Purpose/Additional Information' section is active, showing fields for Request Type (Travel Request), Trip Name, Traveler Type (Employee), Trip Type, Trip Purpose, Business Travel Start/End Dates, Will this trip include personal travel?, Personal Travel Dates, Origin (City, State), Final Destination City, Destination Country, Fund, Financial Unit, Approver (Required field), Function, and Program.

5. In **Request Type**, select **Card & Payment Products Request**, this will update the form to the **Card & Payment Products** form

The screenshot shows the SAP Concur 'New Request' page with 'Request Type' set to 'Card & Payment Products Request'. A red arrow points to the 'Request Type' dropdown menu. The form fields are updated to include 'Request Name', 'User Type', 'Payment Product Type', 'Fund', 'Location', 'Project', 'Task', 'Funding Source', and 'Expenditure Type'.

6. In **Date**, select the Calendar icon and select **Today** to autofill the date, or manually enter today's date

The screenshot shows the SAP Concur 'New Request' page with the 'Date' field open. A calendar for June 2020 is displayed, and a red arrow points to the 'Today' button at the bottom of the calendar.

7. In **Request Name**, enter **New Card Request**

The screenshot shows the 'Request' form with the following fields filled: Request Type: Card & Payment Products Request; Date: 06/29/2020; Request Name: New Card Request; User Type: (empty); Payment Product Type: (empty). The 'Request Name' field is circled in red, and a red arrow points to it from the text above. Other fields like Fund, Financial Unit, Approver, Function, Program, Project, Task, Funding Source, and Expenditure Type are also present but empty.

8. In **User Type**, select **UCSD Employee**. *Please remember, UCOP (UC Office of the President) uses Concur as well, so please make sure to select **UCSD**

The screenshot shows the 'Request' form with the 'User Type' dropdown menu open. The options are: UCOP Employee, UCOP Event Planner, UCSD Employee (circled in red), and UCSD Health. A red arrow points to the 'UCSD Employee' option. The 'Request Name' field is still 'New Card Request'.

9. In **Payment Product Type**, select **UCSD Procurement Card**. *Please remember, UCOP (UC Office of the President) uses Concur as well, so please make sure to select **UCSD**

The screenshot shows the 'Request' form with the 'Payment Product Type' dropdown menu open. The options are: UCOP Declining Balance Card, UCOP Event Planner Card, UCOP Gift Cards (Awards/Recognition), UCOP P-Card, UCOP Travel and Entertainment Card, UCSD Gift Cards (Awards/Recognition), UCSD Human Subject Payments, UCSD Human Subjects Procurement Card, UCSD Procurement Card (circled in red), and UCSD Travel and Entertainment Card. A red arrow points to the 'UCSD Procurement Card' option. The 'User Type' is now 'UCSD Employee'.

10. Enter the Chart of Account (COA) information your card should be primarily attached to. Fill out the red highlighted fields, circled items are the minimum required financial information, include any additional financial information (i.e. Project and Task numbers) if necessary. Your Department Supervisor should be listed as the Approver.

**If you have questions on what to enter for the COA, please speak with your supervisor or fund manager.

The screenshot shows the 'Request' form with the following fields and their status:

- Request Name:** New Card Request
- Business Purpose/Additional Information:** (Empty)
- Request Header:** Expenses, Approval Flow, Audit Trail
- Request Type:** Card & Payment Products Request
- Date:** 06/29/2020
- Request Name:** New Card Request
- User Type:** UCSD Employee
- Payment Product Type:** UCSD Procurement Card
- Fund:** (Empty, highlighted in red)
- Financial Unit (Required field):** (Empty, highlighted in red)
- Approver:** (Empty, circled in red)
- Function:** (Empty, circled in red)
- Program:** (Empty)
- Location:** (Empty)
- Project:** (Empty)
- Task:** (Empty)
- Funding Source:** (Empty)
- Expenditure Type:** (Empty)
- Business Purpose/Additional Information:** (Empty)
- Comment:** (Empty)

11. In the **Business Purpose/Additional Information** section, please enter the **Business Purpose** for the New Card. The general purpose for Student Life is: Purchases related to Student Programming Activities for (list your unit/department)

The screenshot shows the 'Request' form with the following fields and their status:

- Request Name:** New Card Request
- Business Purpose/Additional Information:** Need card to buy lab supplies for Steven's Lab
- Request Header:** Expenses, Approval Flow, Audit Trail
- Request Type:** Card & Payment Products Request
- Date:** 06/29/2020
- Request Name:** New Card Request
- User Type:** UCSD Employee
- Payment Product Type:** UCSD Procurement Card
- Fund:** (1234567) DEMO Fund-(SD)
- Financial Unit:** (1234567) DEMO Financial Unit 1-(SD)
- Approver:** (coa1@ucsd.edu) FinU Approver 1
- Function:** (1234567) DEMO Function-(SD)
- Program:** (123123) DEMO Program-(SD)
- Location:** (1234567) DEMO Location-(SD)
- Project:** (1234567) DEMO Project-(SD)
- Task:** (1234567) DEMO Task-(SD)
- Funding Source:** (1234567) DEMO Funding Source-(SD)
- Expenditure Type:** (1234567) DEMO Expenditure Type
- Business Purpose/Additional Information:** Need card to buy lab supplies for Steven's Lab
- Comment:** (Empty)

12. Click Save

The screenshot shows the SAP Concur 'Request' form. At the top, there are navigation tabs for 'Requests', 'Expense', and 'App Center'. The 'Request' tab is active. Below the navigation, there are buttons for 'Manage Requests', 'Create New', and 'Quick Search'. The main form area is titled 'Request' and includes a 'Status: Not Submitted' indicator. A red circle highlights the 'Save' button in the top right corner. A red arrow points from the 'Save' button towards the 'Expenses' tab in the next screenshot.

13. Navigate to the **Expenses** tab (not the Expense module at the top of the page)

This screenshot shows the same SAP Concur 'Request' form, but the 'Expenses' tab is now selected and highlighted with a red circle. The 'Request Name' is 'New Card Request' and the 'Date' is '06/29/2020'. The 'Business Purpose/Additional Information' field contains the text 'Need card to buy lab supplies for Steven's Lab'. The 'Expenses' tab is the first of three tabs, with 'Approval Flow' and 'Audit Trail' following.

14. The **Expenses** tab will display

The screenshot displays the 'Expenses' tab content within the SAP Concur 'Request' form. The title is 'Request 3CXG'. The 'Request Name' is 'New Card Request' and the 'Business Purpose/Additional Information' is 'Need card to buy lab supplies fo...'. The 'Expenses' tab is selected and highlighted with a red circle. Below the tab, there is a '+ New Expense' button and a table with columns for 'Date', 'Expense Type', 'Amount', and 'Requester'. The table is currently empty. To the right of the table, there is a text area with instructions: 'To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.' Below this text is a list of expense types: 23. Gifts, Prizes, Awards; 25. University Card; 26. Human Subject Payment; Employee - Gift/Prize/Award; Close/Cancel Card; Gift Cards - HS Payments; Non-Employee - Gift/Prize/Award; Limit Increase/Decrease; Payment Directly to PI; UCOP Gift/Prize/Award; New Card; Reload Declining Balance Card; Update Billing Address or Mail Code; Update Name on Card. At the bottom of the form, there are two summary fields: 'TOTAL AMOUNT \$0.00' and 'TOTAL REQUESTED \$0.00'.

15. On the right side of page, in **Expense Types** select **New Card**

Request 3CXG Attachments ▾ Print / Email ▾ Delete Request Submit Request
Status: Not Submitted

Request Name: New Card Request
Business Purpose/Additional Information: Need card to buy lab supplies fo...

Request Header Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#) <<

Date	Expense Type	Amount	Requester
------	--------------	--------	-----------

TOTAL AMOUNT **\$0.00** TOTAL REQUESTED **\$0.00**

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

23. Gifts, Prizes, Awards	25. University Card	26. Human Subject Payment
Employee - Gift/Prize/Award	Close/Cancel Card	Gift Cards - HS Payments
Non-Employee - Gift/Prize/Award	Limit Increase/Decrease	Payment Directly to PI
UCOP Gift/Prize/Award	New Card	
	Reopen Declining Balance Card	
	Update Billing Address or Mail Code	
	Update Name on Card	

16. In **Payment Product Type**, select **UCSD Procurement Card**, in **MC**, enter your mail code

17. In the **Comment** section, you can make the following requests:

- **Send Card to Alternative Address:**
 - While campus is working remotely, exceptions are made for cards to be mailed to home addresses
 - Provide the full home address being requested in the comments
 - This is only an exception to have the **Procurement Card** sent to a home address and does not provide approval for having goods delivered to a home address
- **Display:**
 - Enter what you would like to have displayed on the second line of your Procurement Card, this will display right below your name on the physical card
- **Expedite Card:**
 - Provide a valid reason if the card order needs to be expedited
- **MCC Lift:**
 - Inform the Procurement Card team if any MCC needs to be lifted
 - If you are requesting a MCC lift, provide a detailed and valid business purpose, e.g. Food for student programmatic activities only
- **Lower the standard cycle limit and single purchase limit:**
 - \$4999 is the standard for a single purchase limit and \$10,000 is the standard for a cycle limit on a Procurement Card
 - For a lower standard limit to reduce liability, inform the Procurement Card team, e.g., RA cards, cycle limit at \$1000 and single purchase limit at \$300

The screenshot shows a web form for requesting a procurement card. At the top, there are two dropdown menus: "Expense Type" with "New Card" selected, and "Payment Product Type" with "UCSD Procurement Card" selected. To the right of these is a text input field for "MC (Required field)", which is circled in red and has a red arrow pointing to it. Below the dropdowns is a large text area labeled "Comment", also circled in red with a red arrow pointing to it. At the bottom right of the form are three buttons: "Save" (blue), "Allocate" (white), and "Cancel" (white).

18. Click **Save** to add your expense

Expense Type: New Card

Payment Product Type: UCSD Procurement Card

MC#: 8777

Comment: Please sent the card to 17782 Hill Ave, La Jolla, CA 92093 as I am working from home.

Buttons: Save, Allocate, Cancel

19. In **Expenses/New Expenses**, a line item will display on the left side of the page for **New Card** request

Request Name: New Card Request

Business Purpose/Additional Information: Need card to buy lab supplies fo...

Date	Expense Type	Amount	Requested
06/29/2020	New Card	\$0.00	\$0.00

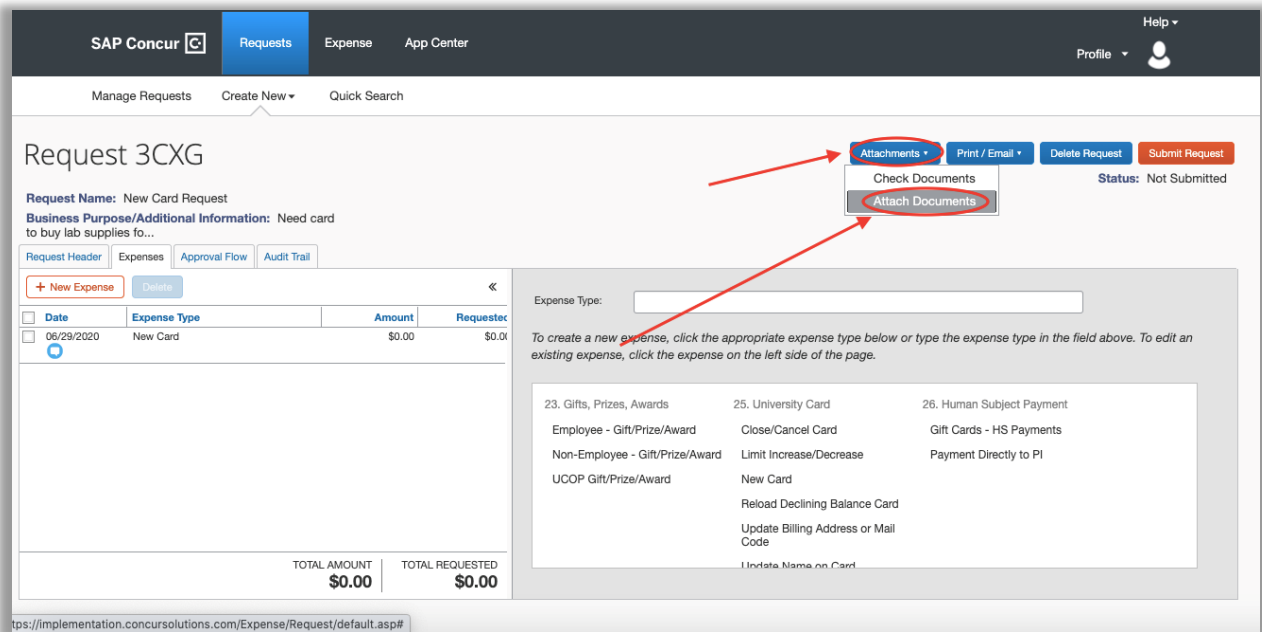
TOTAL AMOUNT: \$0.00

TOTAL REQUESTED: \$0.00

Expense Type list:

- 23. Gifts, Prizes, Awards
- 25. University Card
- 26. Human Subject Payment
- Employee - Gift/Prize/Award
- Close/Cancel Card
- Gift Cards - HS Payments
- Non-Employee - Gift/Prize/Award
- Limit Increase/Decrease
- Payment Directly to PI
- UCOP Gift/Prize/Award
- New Card
- Reload Declining Balance Card
- Update Billing Address or Mail Code
- Update Name on Card

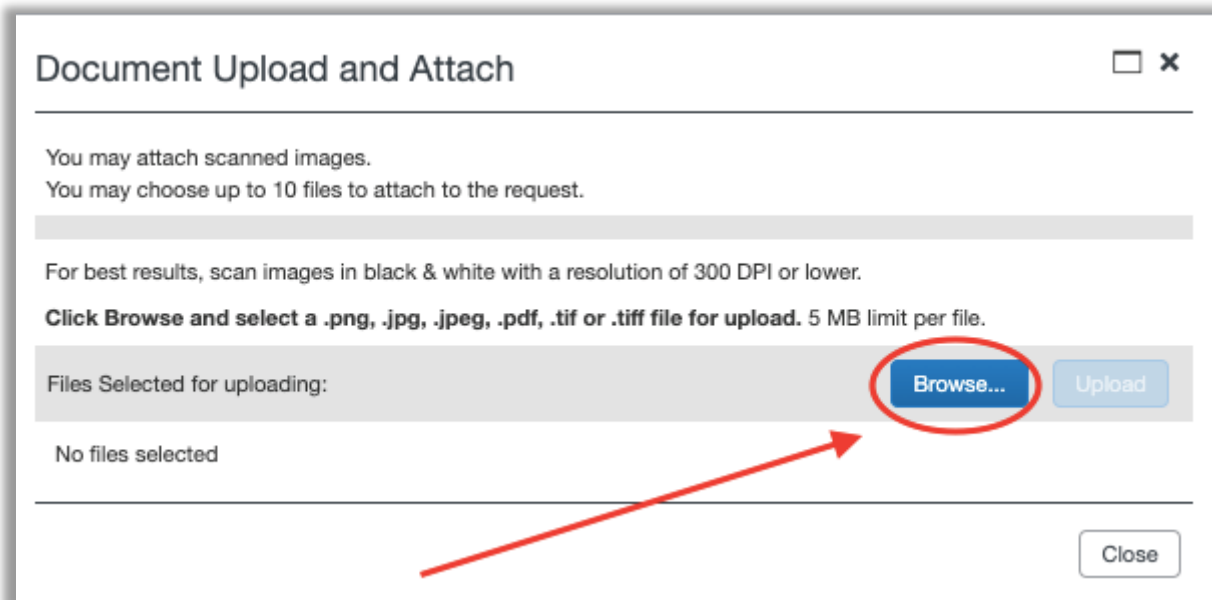
20. To add the required attachments, in upper right, select **Attachments**, select **Attach Documents**



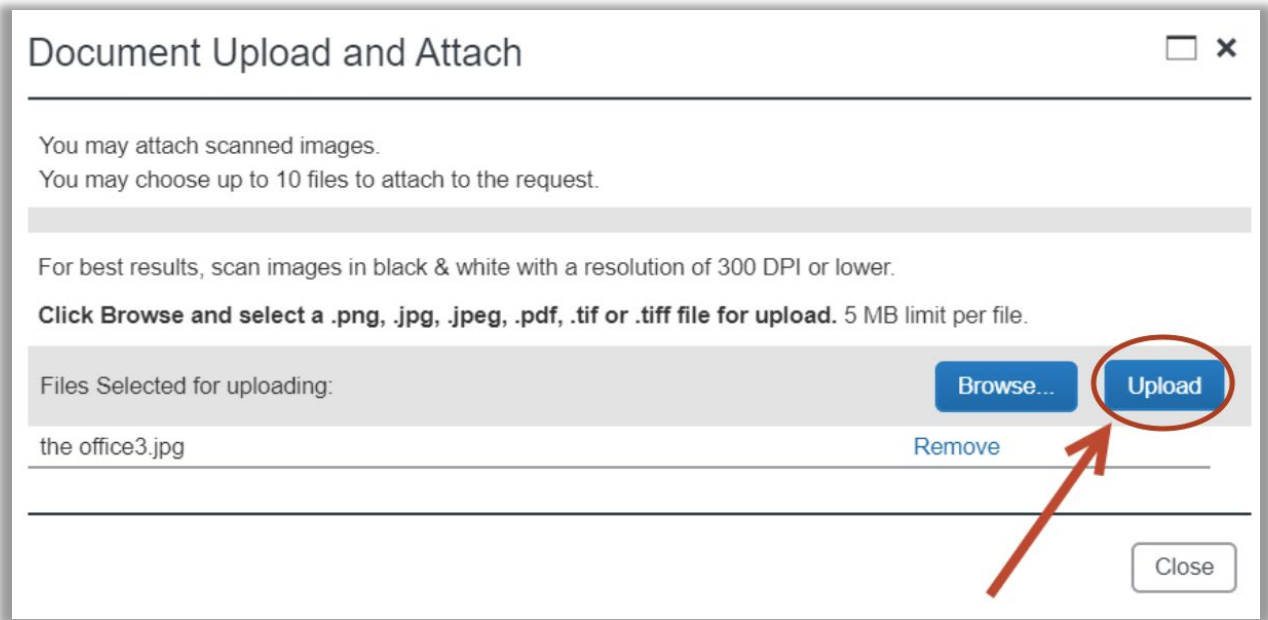
21. Select **Browse** to select a file and attach the **Required Documents for a New Card Request**:

[University Procurement Card Program Completion Certificate](#) (16 min training)

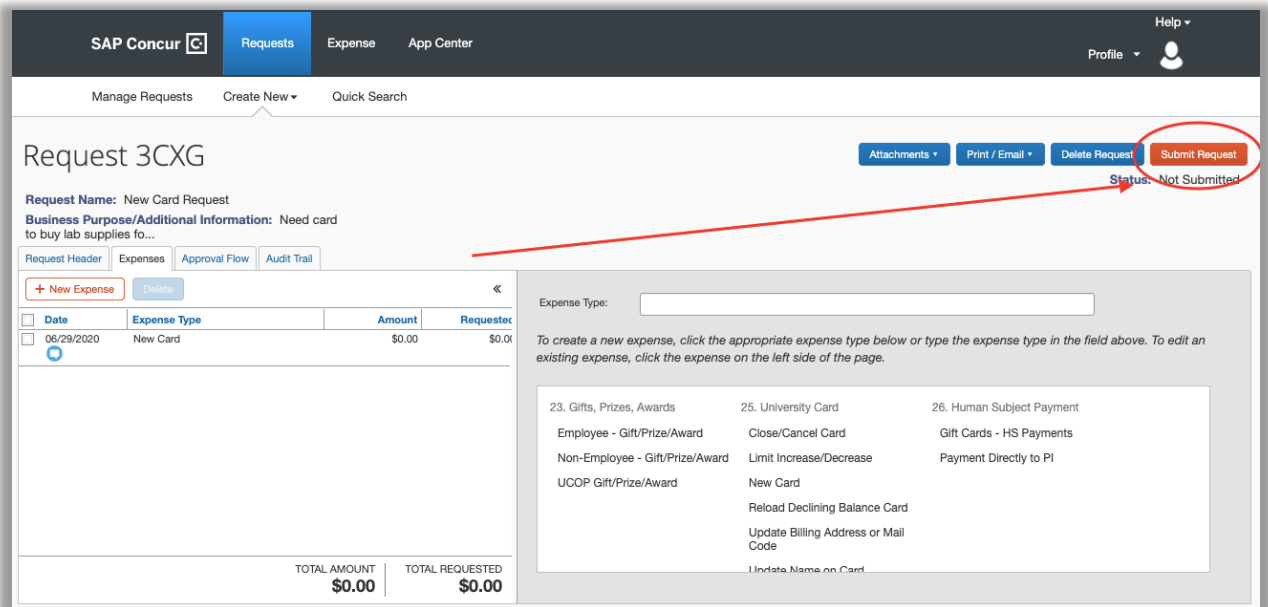
[Procurement Card Cardholder Agreement](#). Procurement Card team is only accepting the most up to date **Cardholder Agreement**, attached here



22. Once you have selected your file(s), select **Upload** and click **Close**



23. Select **Submit Request** and in **Final Review**, select **Accept & Submit** to submit your request



Final Review □ ×

Card & Payment Product Requests

Gift Cards, HS Payments: I certify that I have reviewed the requirements for Human Research Compensation / Payment to PI or Gift Card requests as outlined in the Human Research Payment Coordinator Responsibilities and understand I am responsible to ensure compliance with these guidelines.

Procurement Card and Travel & Entertainment (T&E) Card: I certify that I have read and understood, and attached the appropriate Card Agreement and am responsible to comply with UC Policy, including the submission of required expense reports monthly, or within 45 days of travel or event completion.

Accept & Submit **Cancel**

24. Once the Procurement Card team has received your request, your card will be ordered and mailed

- Card will arrive within 7-10 business days
- For any tracking related inquiries, please contact U.S Bank at **(800) 344-5696**

If you still have questions or need additional assistance, please submit a [ticket](#)