

System Access to Concur

Please verify that you have Concur as an authorize application in RSpace

- Submit a [System Access Request](#) to obtain application access

What You Need to Apply

After verifying eligibility with your supervisor, ensure you have the information required to proceed with the application process. You will need:

- Submit a [T&E Reconciliation/Reimbursement/T&E Card Request](#) to obtain a departmental default chart string (COA) for the card application and Financial Approver Assignment. FAST will provide you with that information, please allow 5 business days.
- A PDF copy of your UC Learning certificate showing you've completed and passed this eCourse "[Travel & Entertainment Card Training](#)."

Complete the Application

1. The Cardholder should complete the card application **via a Card Request in Concur** and certify that the T&E Card will be used exclusively for university travel and entertainment expenses only (i.e., no personal expenditures allowed)

Card Request in Concur

Watch the [Concur Card Request training tutorial](#) for guidance on how to request a T&E Card.

2. Confirm you have entered the correct default COA and understand that you must reconcile T&E Card expenses within **30 days** of your Trip or Event completion.
3. If you have a business need for a card limit greater than the standard \$5,000, you must provide a detailed explanation of your business needs to justify an increased limit.
4. Upload PDF copy of UC Learning certificate in Concur before submitting for approval.

Card Application Explained

Click on the + sign for more details

The screenshot shows the 'Create New Request' form. A tooltip titled 'Request Type & Card Type' is displayed in the center. The tooltip contains the following text:

Request Type & Card Type

For Request Type, be sure to choose Card Request to load the appropriate form fields.

For Card Type, ensure you 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 (the Procurement Card or Travel & Entertainment Card).

The form background shows the following fields:

- Request Type: *Card Request
- Card Type: None Selected
- Request Name: SDanford T&E Card
- Accountability Structure: (D01100)Accounting
- Function: Search by Code
- Fund: (19900) GENERAL FUNDS
- Project: Search by Code

Card Application Explained

Click on the + sign for more details

The screenshot shows the 'Create New Request' form. A tooltip titled 'Request Name' is displayed in the center. The tooltip contains the following text:

Request Name

The Request Name should follow this nomenclature: First Initial, Last Name, and Card Type: ex. SDanford T&E Card

The form background shows the following fields:

- Request Type: *Card Request
- Card Type: None Selected
- Request Name: SDanford T&E Card
- Accountability Structure: (D01100)Accounting
- Activity: (A01206)Accounting
- Fund: (19900) GENERAL FUNDS
- Function: Search by Code
- Cost Center: Search by Code
- Project: Search by Code

Card Application Explained

Click on the + sign for more details

The screenshot shows the 'Create New Request' form with a modal window titled 'Default Chartstring' open. The modal contains the following text:

Default Chartstring

The chartstring associated with the card request will be utilized as the default chartstring to charge departments for unreconciled expenses. If a cardholder is not sure what to enter in for this information, please reach out to your Financial Officer.

The default chartstring must be reviewed for accuracy by the Financial Approver. If necessary, Financial Approvers may update the chartstring in Concur during the card request approval process.

The background form includes the following fields:

- Request Type * (Card Request)
- Card Type * (None Selected, Procurement Card, Travel & Entertainment Card)
- Accountability Structure * ((D01100) Accounting)
- Function * (Search by Code)
- Comment
- Request Name * (SDanford T&E Card)
- Fund * ((19900) GENERAL FUNDS)
- Project (Search by Code)

Buttons for 'Cancel' and 'Create Request' are visible at the bottom right.

Summary

Allow approximately 2 weeks for U.S. Bank to mail the card to your address. After receiving the T&E Card and PIN, cardholders can update their PIN (instructions provided).

[Concur Travel Training](#)

[Travel Policy G-28](#)

[PCard and T&E Payment Matrix](#)