



# Credit Card Request

REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS  
TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

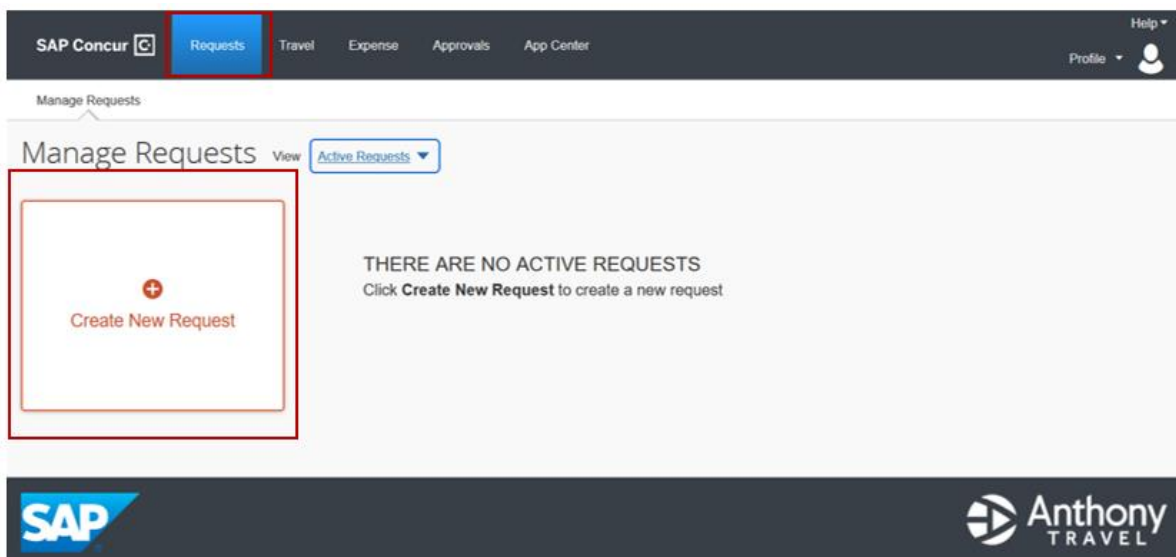
Credit cards are helpful in achieving the university's teaching and research missions through enabling the purchase of services and materials. These credit cards should be used for university business only.

## Starting the Request

There are two ways to create the credit card request.

### Credit Card Request Creation #1

You can click on the **Requests** tab from the Concur home page, which will take you to the **Manage Requests** page. Then, click **Create New Request**.



OR

### Credit Card Request Creation #2

From the Concur home page, hover over **+ New** and select **Start a Request** from the dropdown menu.

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SAP Concur | Requests | Travel | Expense | Approvals | Reporting | App Center | Administration | Help | Profile | Hello, Rachel

**New** | 00 Required Approvals | 02 Authorization Requests | 100 Available Expenses | 00 Open Reports

**Start a Request**

**TRIP SEARCH**

**ALERTS**

**COMPANY NOTES**

**MY TASKS**

## Filling out the Create New Request

### Request Type Field

Select **Credit Card Request**.

Create New Request

Request Type \*  
\*Pre-Trip Request  
None Selected  
\*Pre-Trip Request  
**\*Credit Card Request**  
\*Department Advance

Request Name \*  
Business Travel Start Date \*  
MM/DD/YYYY

Trip Purpose \*  
None Selected

Detailed Trip Purpose

Traveler Type \*  
Employee

Trip Type \*  
None Selected

Will this trip include personal travel? \*  
None Selected

Personal Travel Dates

How will you book travel? \*  
None Selected

Index \*  
Search by Code

Activity Code

Comment

Cancel Create

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## Request Name & Card Request Type

The **Request Name** should be descriptive enough for you and your budget authorities to know the purpose of the request. Best naming practices include your department, unit or group, the type of card, and your name in the **Request Name** field (i.e., “DEPT CARD – B. Beaver”, “T&E Card-Benny Beaver”, or “SGT – Beaver Believers”). This field is limited to 32 characters.

Under the **Card Request Type** select **New Card** from the dropdown menu.

Create New Request

Request Type \*  
Credit Card Request

Request Name \*  
T&E Card Request - Benny Beaver

Card Request Type \*  
None Selected  
None Selected  
Cancel Card  
Card Update  
New Card

Card Type \*  
Travel & Expense Card

Department Name \*

Department Phone # \*

Last 4 Digits \*  
0000

Reason for Card Cancellation  
None Selected

Card Cancellation Effective Date \*  
MM/DD/YYYY

User Type  
Employee

Default Index \*  
Search by Code

Comment

Cancel Create

## Select Card Type

Under the dropdown menu for **Card Type** you have three options:

- Department Card
- Student Group Card
- Travel & Expense Card

A **Department Card** is issued to an individual in a department, unit, or other office environment and is used primarily for the acquisition of goods or services.

A **Student Group Card** is issued to leaders of student trips to use for expenses during the trip.

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TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

A **Travel & Expense Card** is issued to an individual to use for travel and other related expenses.

The screenshot shows a web form titled "Create New Request" with a close button (X) in the top right corner. The form is organized into several sections:

- Request Type:** A dropdown menu with the selected option being "\*Credit Card Request".
- Request Name:** A text input field containing "T&E Card Request - Benny Beaver".
- Card Request Type:** A dropdown menu with the selected option being "New Card".
- Card Type:** A dropdown menu with "Travel & Expense Card" selected. A list of options is visible: "None Selected", "Department Card", "Student Group Card", "Travel & Expense Card" (highlighted), and "None Selected".
- Department Name:** A text input field with a help icon (?) and a search dropdown.
- Department Address:** A text input field with a search dropdown labeled "Search by Code".
- Last 4 Digits:** A text input field containing "0000".
- Monthly Credit Limit Requested:** A text input field containing "10000".
- Card Cancellation Effective Date:** A date input field with a calendar icon and a help icon (?), showing the format "MM/DD/YYYY".
- User Type:** A text input field containing "Employee".
- Default Index:** A text input field with a search dropdown labeled "Search by Code" and a help icon (?).
- Comment:** A large text area for entering a comment.

At the bottom right of the form, there are two buttons: "Cancel" and "Create".

## Department Name and Department Address

The **Department Name** field is where you should enter in the name of your department, unit, or student group; the **Department Name** will be embossed on the card, underneath your name if you select **Department Card** or **Travel & Expense Card**.

# Credit Card Request

REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS  
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The screenshot shows a 'Create New Request' form with the following fields and values:

- Request Type: \*Credit Card Request
- Request Name: T&E Card Request - Benny Beaver
- Card Request Type: New Card
- Card Type: Travel & Expense Card
- Department Name: Your Dept Name Here
- Department Address: 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331
- Department Phone #: 541-737-1000
- Last 4 Digits: 0000
- Monthly Credit Limit Requested: 10000
- Reason for Card Cancellation: None Selected
- Card Cancellation Effective Date: MM/DD/YYYY
- User Type: Employee
- Default Index: Search by Code
- Comment: (empty)

In the **Department Address** field, start typing the name of the building in which your department/unit resides, or start typing in the location of your field office, or “Ext” if you work in a county extension office.

The screenshot shows the 'Department Address' field with a dropdown menu open. The input field contains 'Ext'. The dropdown menu lists the following address suggestions:

- (LHBCC) 100 SW MEMORIAL PL, CORVALLIS, OR 97331
- (HP Bldg 11) 1000 NE CIRCLE BLVD, CORVALLIS, OR 97330
- (Lake Cty Ext) 103 S E ST, LAKEVIEW, OR 97630
- (Weniger Hall) 103 SW MEMORIAL PL, CORVALLIS, OR 97331
- (Avery House) 1030 SW MADISON AVE, CORVALLIS, OR 97331
- (CEOAS Sciences Admin Bldg) 104 SW 26TH ST, CORVALLIS, OR 97331
- (Johnson Hall) 105 SW 26TH, CORVALLIS, OR 97331
- (Avery House) 1030 SW MADISON AVE, CORVALLIS, OR 97331

## Department Phone

The **Department Phone** field code is where you should list your office phone number. The phone number must be entered in the XXX-YYY-ZZZZ format, where X is the area code, Y is the first three digits of the phone number, and Z is the last four digits of the phone number.

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The screenshot shows a 'Create New Request' form with the following fields and values:

- Request Type: \*Credit Card Request
- Request Name: T&E Card Request - Benny Beaver
- Card Request Type: New Card
- Card Type: Travel & Expense Card
- Department Name: Your Dept Name Here
- Department Address: (g) 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331
- Department Phone #: 541-737-1000 (highlighted with a red box)
- Last 4 Digits: 0000
- Monthly Credit Limit Requested: 10000
- Reason for Card Cancellation: None Selected
- Card Cancellation Effective Date: MM/DD/YYYY
- User Type: Employee
- Default Index: Search by Code
- Comment: (empty text area)

Buttons: Cancel, Create

## Last 4 Digits

The **Last 4 Digits** field refers to the last four digits of your issues credit card and is only required if you are making updates to an existing card. If you are creating a new **Credit Card Request**, you can leave this field blank.

## Monthly Credit Limit

\$10,000 is the standard monthly spending limit. If you require a higher spending limit, please enter the requested limit. Your request will go through budget authority approval. If you find after initially receiving your credit card that you need a higher monthly limit, you will need to submit a new request for a **Card Update** to request an increase.

## Reason for Card Cancellation and Card Cancellation Effective Date

If you are creating a new **Credit Card Request**, you can leave this field blank. This field is only required if you are request to cancel a current credit card.

# Credit Card Request

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The screenshot shows the 'Create New Request' form with the following fields and values:

- Request Type: \*Credit Card Request
- Request Name: T&E Card Request - Benny Beaver
- Card Request Type: New Card
- Card Type: Travel & Expense Card
- Department Name: Your Dept Name Here
- Department Address: (g) 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331
- Department Phone #: 541-737-1000
- Last 4 Digits: 0000
- Monthly Credit Limit Requested: 10000
- Reason for Card Cancellation: None Selected
- Card Cancellation Effective Date: MM/DD/YYYY
- User Type: Employee
- Default Index: Search by Code

Red boxes highlight the 'Last 4 Digits' and 'Reason for Card Cancellation' fields. A large red text overlay on the right says 'Skip these sections'.

## Default Index

In the **Default Index** field you will need to search for, and select, your index. While you can allocate expenses to different indexes through the reconciliation process, this index should be one that you will regularly be able to access (*i.e., a department index issued to you by your department, instead of a grant index*) and will be used if you are unable to reconcile your card expenses before year end close.

The screenshot shows the 'Create New Request' form with the following fields and values:

- Request Type: \*Credit Card Request
- Request Name: T&E Card Request - Benny Beaver
- Card Request Type: New Card
- Card Type: Travel & Expense Card
- Department Name: Your Dept Name Here
- Department Address: (g) 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331
- Department Phone #: 541-737-1000
- Last 4 Digits: 0000
- Monthly Credit Limit Requested: 10000
- Reason for Card Cancellation: None Selected
- Card Cancellation Effective Date: MM/DD/YYYY
- User Type: Employee
- Default Index: Search for index here

A red box highlights the 'Default Index' field. The 'Comment' field contains the text: 'Requesting card for travel on official university business and for use in purchasing supplies for research projects'.

# Credit Card Request

REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS  
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## Comment

The **Comment** field is where you can make a note to the budget authority or approver about why you are requesting a new credit card. Best practices recommend that you provide a brief explanation for your request.

The screenshot displays a web form for a credit card request. The form includes several input fields: Card Type (dropdown menu with 'Travel & Expense Card' selected), Department Name (text input with 'Your Dept Name Here'), Department Address (text input with '1500 SW JEFFERSON AVE, CORVALLIS, OR 97331'), Department Phone # (text input with '541-737-1000'), Last 4 Digits (text input with '0000'), Monthly Credit Limit Requested (text input with '10000'), Reason for Card Cancellation (dropdown menu with 'None Selected'), Card Cancellation Effective Date (calendar input with 'MM/DD/YYYY'), User Type (text input with 'Employee'), and Default Index (dropdown menu with 'Search by Code'). A large text area for 'Comment' is highlighted with a red border and contains the text: 'Requesting card for travel on official university business and for use in purchasing supplies for research projects'. At the bottom right, there are 'Cancel' and 'Create' buttons, with the 'Create' button also highlighted by a red box.

Once you have filled out the new card request, select **Create** at the bottom right of the page. This will allow you to review your request before submitting it. After reviewing your request and ensuring accuracy, select **Submit Request** to be routed for approval.

## Training for Credit Card Users

Anyone requesting an OSU credit card is required to pass the **Cardholder Knowledge Test** before the card will be issued. The test results are valid for two years, after which the card holder needs to retake the test. If you have questions about whether or not you need to retake the test, please e-mail us at [Procurement.Cards@oregonstate.edu](mailto:Procurement.Cards@oregonstate.edu).



# Credit Card Request

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## Updating Your Credit Card

If you currently have a credit card and need to increase your monthly spending limit or update the default index, you will need to update this information through Concur through the **Card Update** process.

If you need to update your credit card due to a name change or transitioning to a new department, please cancel your current card and submit a **New Card Request**.

Create New Request

Request Type \*  
\*Credit Card Request

Request Name \*  
Update T&E Card - B. Beaver

Card Request Type \*  
Card Update

Card Type \*  
Travel & Expense Card

Department Name \* ?  
Your Dept Name Here

Department Address \*  
(g) 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331

Department Phone # \*  
541-737-1000

Last 4 Digits ?  
1234

Monthly Credit Limit Requested ?  
30000

Reason for Card Cancellation  
None Selected

Card Cancellation Effective Date ?  
MM/DD/YYYY

User Type  
Employee

Default Index \*  
Search by Code

Comment  
Requesting higher monthly limit due to increased monthly travel

Cancel Create

## Creating Card Update Request

You will need to create a **New Request** following the instructions in the beginning of this process document. Here is how to proceed once you arrive at the **Create New Request** screen.

### Request Type Field

Select **Credit Card Request**.

### Request Name & Card Request Type

# Credit Card Request

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The **Request Name** should be descriptive enough for you and your budget authorities to know the purpose of the request, be sure to include a note that this is a card update (*i.e.*, “Update to Dept Card-ABC Dept” or “Card Update-Beaver Believer Club”). This field is limited to 32 characters.

Under the **Card Request Type** select **Card Update** from the dropdown menu.

## Select Card Type

Under the dropdown menu for **Card Type** select the type of card which you are updating:

- Department Card
- Student Group Card
- Travel & Expense Card

## Department Name and Department Address

Please enter in the name of your department, unit, or student group in the **Department Name**. The **Department Name** will be embossed on the card, underneath your name if you select **Department Card** or **Travel & Expense Card**.

In the **Department Address** field, start typing the name of the building in which your department/unit resides, or start typing in the location of your field office, or “Ext” if you work in a county extension office.

## Department Phone

The **Department Phone** field code is where you should list your office phone number. The phone number must be entered in the XXX-YYY-ZZZZ format, where X is the area code, Y is the first three digits of the phone number, and Z is the last four digits of the phone number.

## Last 4 Digits

# Credit Card Request

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TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

The **Last 4 Digits** field is required for **Card Update** requests. This refers to the last four digits of your issued credit card.

## Monthly Credit Limit

\$10,000 is the standard monthly spending limit. If you are submitting the **Card Update** request for a higher spending limit, please enter the requested limit and in the **Comments** section provide a reason for your requested increase. Your request will go through budget authority approval.

## Reason for Card Cancellation and Card Cancellation Effective Date

If you are submitting a **Card Update** request, you can leave this field blank. This field is only required if you are requesting to cancel a current credit card.

## Default Index

If you are updating the index with your **Card Update** request, search for and select the new index in the **Default Index** field. While you can allocate expenses to different indexes through the reconciliation process, this index should be one that you will regularly be able to access (*i.e., a department index issued to you by your department, instead of a grant index*) and will be used if you are unable to reconcile your card expenses before year end close.

## Comment

The **Comment** field is where you can make a note to the budget authority or approver about why you are updating an existing credit card. Best practices recommend that you provide a brief explanation for your request.

Once you have filled out the **Update Card** request, select **Create** at the bottom right of the page. This will allow you to review your request before submitting it. After reviewing your request and ensuring accuracy, select **Submit Request** to be routed for approval.

# Credit Card Request

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## Cancelling Your Credit Card

If you currently have a credit card and need to cancel your credit card for any reason, please follow through the **Cancel Card** process.

The screenshot shows a web form titled "Create New Request" with a close button (X) in the top right corner. The form is divided into several sections:

- Request Type \***: A dropdown menu with "Credit Card Request" selected.
- Request Name \***: A text input field containing "Cancel T&E Card - B. Beaver".
- Card Request Type \***: A dropdown menu with "Cancel Card" selected.
- Card Type \***: A dropdown menu with "Travel & Expense Card" selected.
- Department Name \***: A text input field with a help icon and placeholder text "Your Dept Name Here".
- Department Address \***: A text input field with a location pin icon and placeholder text "(g) 1500 SW JEFFERSON AVE, CORVALLIS, OR 97331".
- Department Phone # \***: A text input field containing "541-737-1000".
- Last 4 Digits ?**: A text input field containing "1234".
- Monthly Credit Limit Requested ?**: A text input field containing "10000".
- Reason for Card Cancellation**: A dropdown menu with "Change in Role/Department" selected.
- Card Cancellation Effective Date ?**: A date picker field showing "06/01/2021".
- User Type**: A dropdown menu with "Employee" selected.
- Default Index \***: A dropdown menu with "Search by Code" selected and a help icon.
- Comment**: A text area containing "Cancel T&E card due to change in department".

At the bottom right of the form, there are two buttons: "Cancel" and "Create".

## Creating Cancel Card Request

You will need to create a **New Request** following the instructions in the beginning of this process document. Here is how to proceed once you arrive at the **Create New Request** screen.

### Request Type Field

Select **Credit Card Request**.

### Request Name & Card Request Type

The **Request Name** should be descriptive enough for you and your budget authorities to know the purpose of the request, be sure to include a note that this is a card update (i.e., "Cancel SG Card-Beaver Believers" or "T&E Card Cancel-B. Beaver"). This field is limited to 32 characters.

# Credit Card Request

REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS  
TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

Under the **Card Request Type** select **Cancel Card** from the dropdown menu.

## Select Card Type

Under the dropdown menu for **Card Type** select the type of card which you are updating:

- Department Card
- Student Group Card
- Travel & Expense Card

If you hold multiple types of credit cards you will need to submit a **Cancel Card** request for each one.

## Department Name and Department Address

The **Department Name** field is where you should enter in the name of your department, unit, or student group.

In the **Department Address** field, start typing the name of the building in which your department/unit resides, or start typing in the location of your field office.

## Department Phone

The **Department Phone** field code is where you should list your office phone number.

## Last 4 Digits

The **Last 4 Digits** field is required for **Cancel Card** requests. This refers to the last four digits of your issued credit card that you are cancelling.

## Monthly Credit Limit

You can skip this field as it is not required with a card cancellation request.

# Credit Card Request

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TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

## Reason for Card Cancellation and Card Cancellation Effective Date

These fields are required if you are submitting a **Cancel Card** request.

In the **Reason for Card Cancellation** dropdown menu, select either **Change in Role/Department** or **Termination**.

Reason for Card Cancellation

None Selected

None Selected

Change in Role/Department


Termination

- Select **Change in Role/Department** if you are transitioning to a different department within OSU.
- Select **Termination** if you are leaving OSU.

For the **Card Cancellation Request Date**, you can either enter in the date manually (*i.e.*, *MM/DD/YYYY format*) or you can search and select the cancellation date by clicking the small calendar icon.

Card Cancellation Effective Date ?

06/01/2021



## Default Index

Enter in the index associated with the card you are cancelling.

## Comment

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The **Comment** field is where you can make a note to the budget authority or approver about why you are cancelling an existing credit card. Best practices recommend that you provide a brief explanation for your request.

Once you have filled out the **Cancel Card** request, select **Create** at the bottom right of the page. This will allow you to review your request before submitting it. After reviewing your request and ensuring accuracy, select **Submit Request** to be routed for approval.

## Destroying the Card

After submitting your Card Cancellation Request, please safely shred and dispose of the credit card.

### Still have questions? Contact us!

Questions related to **travel**:  
[Travel@oregonstate.edu](mailto:Travel@oregonstate.edu)

Questions related to **credit cards**:  
[Procurement.Cards@oregonstate.edu](mailto:Procurement.Cards@oregonstate.edu)

Website: [fa.oregonstate.edu/travel-and-expense](https://fa.oregonstate.edu/travel-and-expense)