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.

**Credit Card Request Creation #2**

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

Request Type Field

Select Credit Card Request.
Credit Card Request
REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS
TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

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.

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

**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**.
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.
Credit Card Request
REQUESTING, UPDATING, AND CANCELLING CREDIT CARDS
TRAVEL & EXPENSE CARD, DEPARTMENT CARD, OR STUDENT GROUP CARD

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.
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.
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.

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.
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.

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
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**
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.
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.

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.
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.
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.

- 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.

Default Index

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

Comment
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.

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**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](http://fa.oregonstate.edu/travel-and-expense)