

# CSUSB Universal Card

Concur User Guide – Credit Card Service Request



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# CREDIT CARD SERVICE REQUEST

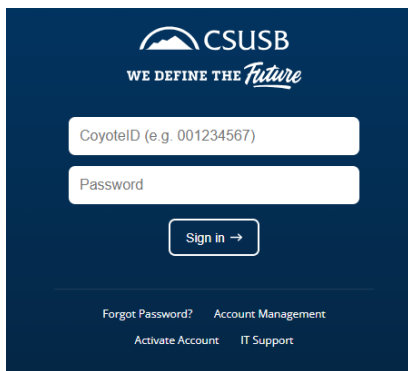
## Logging into Concur

**Note:** The screen captures included in this document may look slightly different on-screen due to user interface changes made by campus.

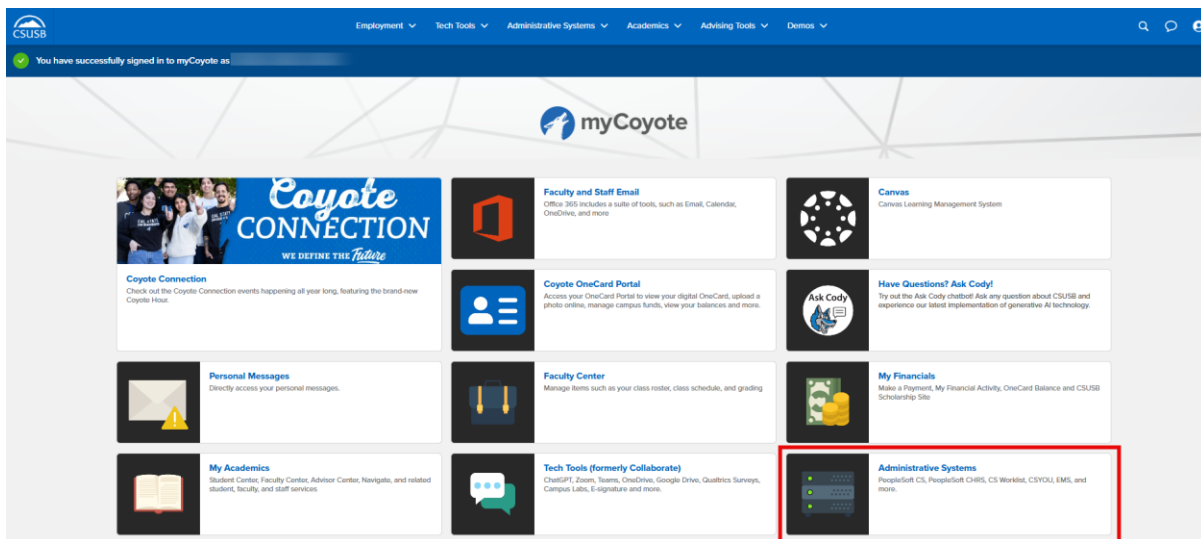
1. Navigation: Go to **CSUSB.edu** and click on **myCoyote** in the upper right-hand corner of the main CSUSB website.



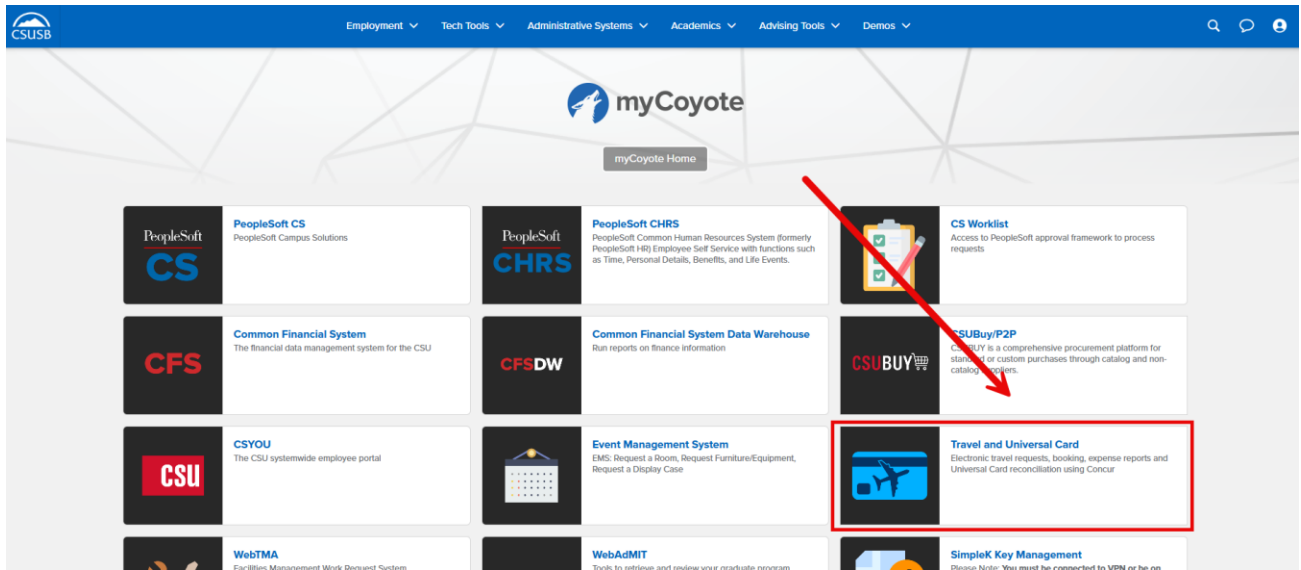
2. Sign in using your Single Sign On.



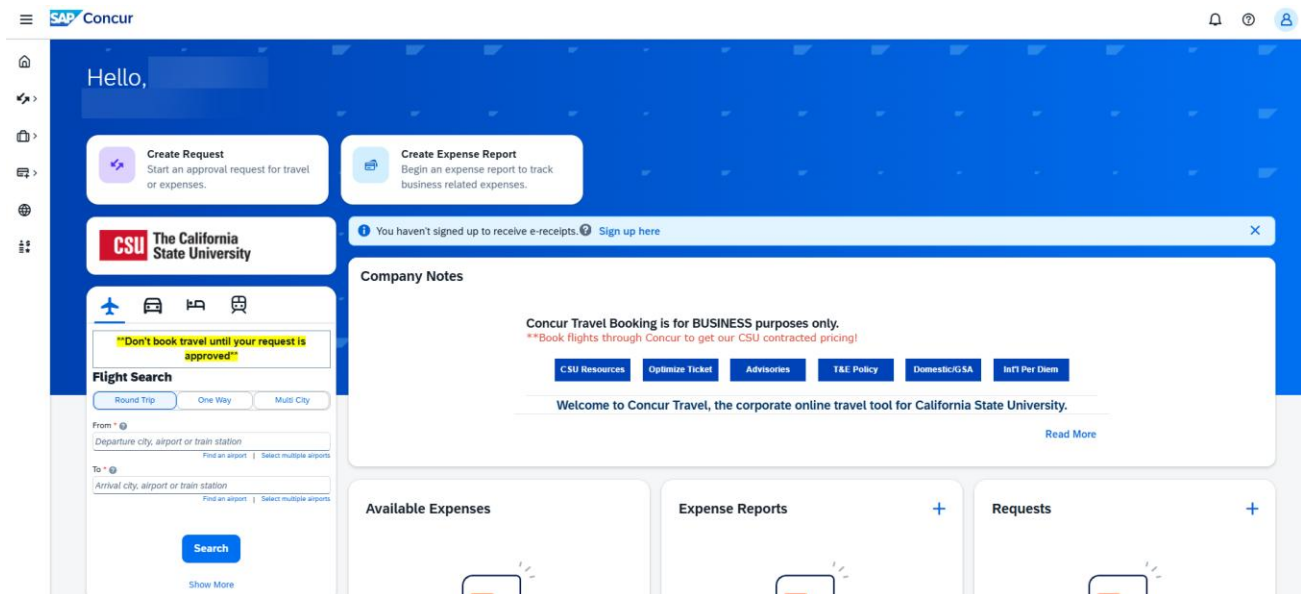
3. Click on the **Administrative Systems** tile.



4. Click on the **Travel and Universal Card** tile. You will be signed into Concur.



5. Once you have logged into Concur, you will be on the main landing page.



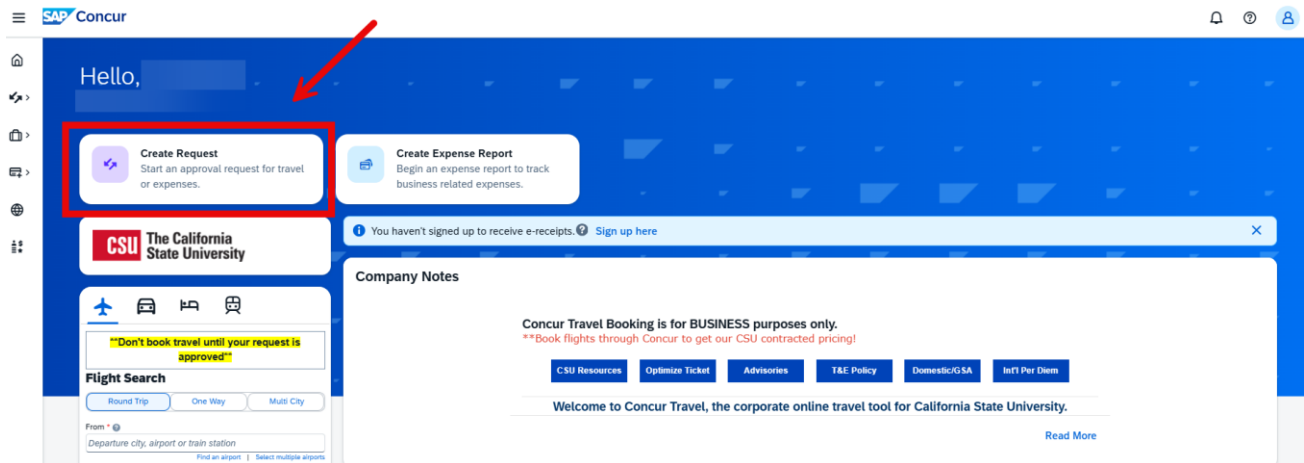
# Creating a Credit Card Service Request

Before completing a credit card service request, review and ensure you understand the Universal Card Handbook. For questions or additional guidance, reach out to [UniversalCard@csusb.edu](mailto:UniversalCard@csusb.edu).

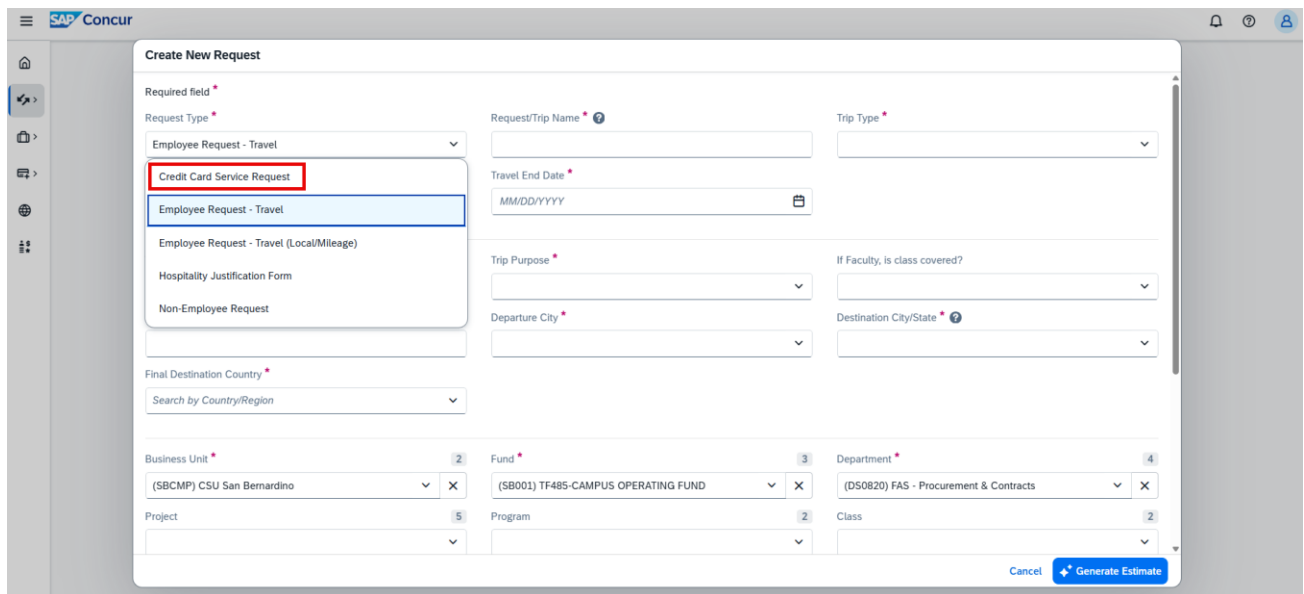
**Note:** The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur.

## Request Header

1. From the **Home** page, click **Create Request**.



2. In the **Create New Request** window, click the drop-down in the **Request Type** field and select **Credit Card Service Request**.



3. The **Request Header** fields for the Credit Card Service Request display. Complete the Request Header details. All fields identified with an asterisk (\*) are required.
- a. Request Layout

- b. Review and complete all required fields (\*) and any optional fields, as desired.

Field Name	Description
<b>Request Type *</b>	Automatically populates from the previous step when <b>Credit Card Service Request</b> is selected.
<b>Request Name *</b>	Enter a meaningful request name that clearly indicates the type of request being submitted. Use the required naming conventions (e.g., New Universal Card, Limit Change, Suspend/Reinstate, etc.).
<b>Today's Date *</b>	Select the Current Date.
<b>Type of Card *</b>	Select the option <b>Universal Card</b> .
<b>Business Unit *</b>	The Business Unit is automatically populated from the CHRS database based on the employee's primary business unit and cannot be modified.
<b>Fund *</b>	The Fund field is automatically populated from CHRS based on the employee's primary record.
<b>Department *</b>	The Department field is automatically populated from CHRS based on the employee's primary record.
<b>Comment</b>	Provide a brief business justification for the request. This comment is for DOA review only, not for processing.

4. After completing all relevant fields, select **Create Request**.

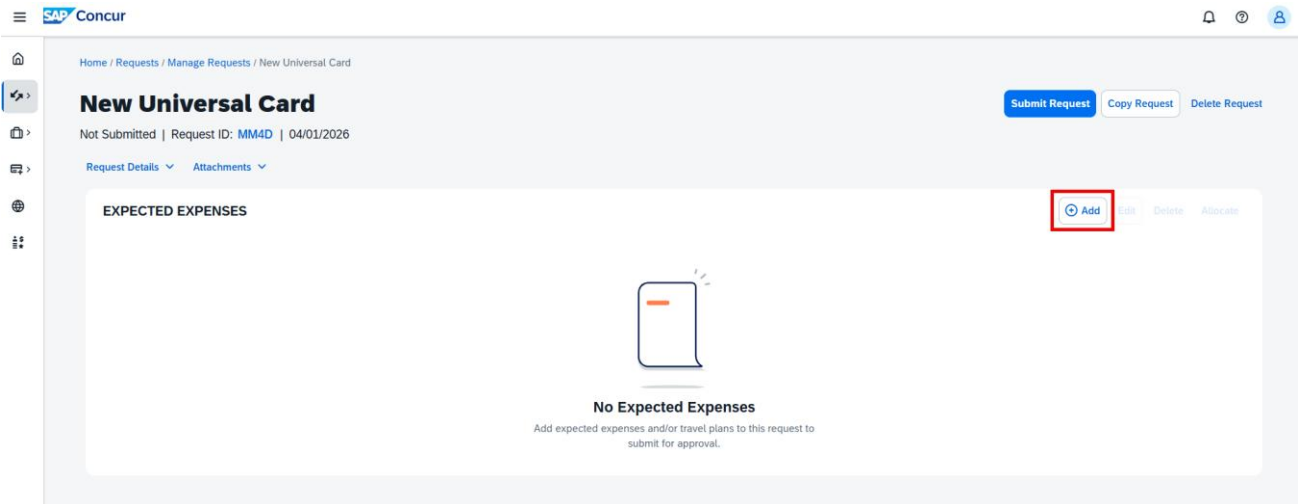
The screenshot shows the 'Create New Request' form in SAP Concur. The form includes the following fields and annotations:

- Request Type:** A dropdown menu with 'Credit Card Service Request' selected.
- Request Name:** A text input field with the placeholder text 'Enter type of request'. A red arrow points to this field from a red-bordered box containing the following text: 'Use a clear request name that matches the request type and follows naming standards, such as: New Universal Card, Credit Limit Change, Suspend/Reinstate, Cancel Card, Name Change, or Replacement/Worn Card'.
- Today's Date:** A date input field with the placeholder text 'MM/DD/YYYY' and 'Enter Date of Request'.
- Type of Card:** A dropdown menu with 'Universal Card' selected.
- Business Unit:** A dropdown menu with '(SBCMP) CSU San Bernardino' selected.
- Fund:** A dropdown menu with a red-bordered box around it containing the text 'Confirm the default Fund auto-populates correctly.'
- Department:** A dropdown menu with a red-bordered box around it containing the text 'Confirm the default Department auto-populates correctly.'
- Comment:** A large text area with the instruction 'Provide a brief business justification for the request. This comment is for DOA review only, not for processing.'
- Buttons:** 'Cancel' and 'Create Request' buttons at the bottom right. A red arrow points to the 'Create Request' button, which is also highlighted with a red-bordered box.

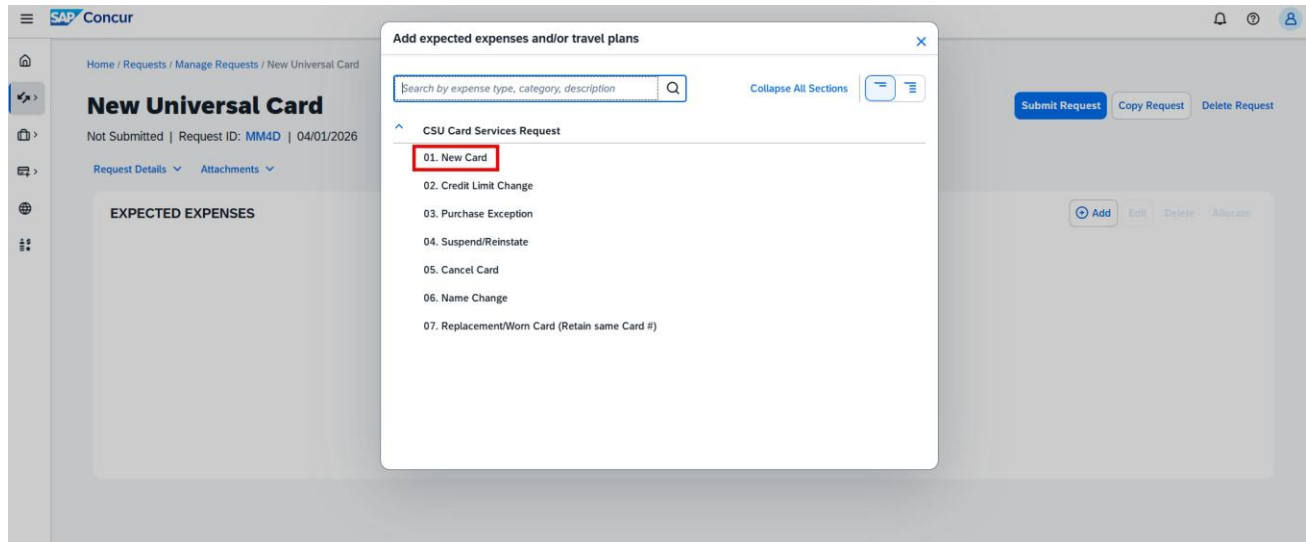
## Adding Card Service to Request – 01. New Card

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality of adding services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **01. New Card** for your request.



3. The **New Expense** form for the selected service displays (e.g., New Card).

**Note:** The form fields will differ based on the card service selected.

**Quick Tips** (provided in blue) display important information related to the details being requested.

a. Request Layout

b. Review and complete all required fields (\*) and any optional fields, as desired.

Field Name	Description
<b>Requested Date*</b>	Enter the date the request is being submitted.
<b>Requested Single Transaction Limit*</b>	By default, all cardholders will begin at <b>tier one</b> (\$1,500 single transaction limit).
<b>Requested Monthly Limit*</b>	By default, all cardholders will begin at <b>tier one</b> (\$3,000 monthly limit).
<b>Employee First Name*</b>	Automatically populated from CHRS system records. Verify accuracy; if incorrect, the employee must contact Human Resources (HR) to update their official employee record.
<b>Employee Middle Name/Initial</b>	Enter if applicable, and if you would like the information to be reflected on your physical card.
<b>Employee Last Name*</b>	Automatically populated from CHRS system records. Verify accuracy; if incorrect, the employee must contact Human Resources (HR) to update their official employee record.
<b>Campus Phone Number*</b>	Provide the employees' primary campus contact number. Enter dash character format ###-###-####.
<b>Card Training Completed</b>	Confirm completion of all required Universal Card training prior to submission.
<b>Provide Justification for New Card*</b>	Provide a clear and concise business justification, including the types of purchases to be made and how the card supports the employee's job responsibilities.

- Click **Save** and then the **Expected Expenses** screen displays.

**Note:** Once saved, alerts may display if information is missing for the expense.

Home / Requests / Manage Requests / New Universal Card / New Expense: 01. New Card

## New Expense: 01. New Card

**Quick Tips** Show Less  
Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more. Declining Balance Cards will be determined based on business justification.

**Allocate**

Required field \*

Requested Date \* 04/01/2026

Type of Card Universal Card

Requested Single Transaction Limit \* \$1,500

Requested Monthly Limit \* \$3,000

Employee First Name \* Auto populates from CHRS

Employee Middle Name/Initial

Employee Last Name \* Auto populates from CHRS

Campus Phone Number \* Cardholder's primary campus contact number (###-###-####)  Card Training Completed

Mobile Phone Number

Provide Justification for New Card \* 158/2000

**Provide a clear and concise business justification, including the types of purchases to be made and how the card supports the employee's job responsibilities.**

**Save** Cancel

- The **Expected Expenses** screen displays, allowing users to add the required Attachments for the new card request.

**Note:** All new card requests require the applicant to complete the CSU Chancellor's Office Payment Card Program training and the campus' Universal Card training prior to card issuance.

- Select **Attachments** from the **Expected Expenses** screen, to display the menu options.

Home / Requests / Manage Requests / New Universal Card

## New Universal Card

Not Submitted | Request ID: MM4D | 04/01/2026

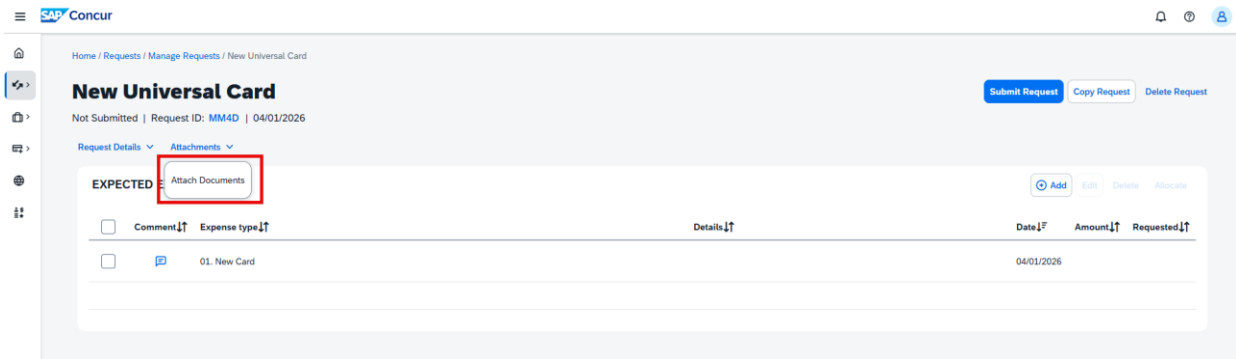
Request Details Attachments

**EXPECTED EXPENSES**

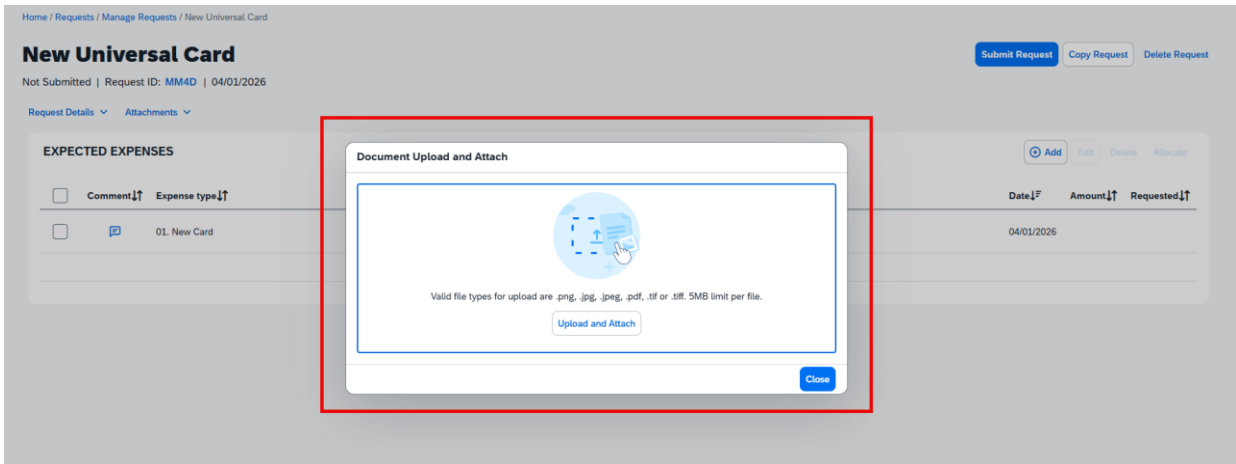
**Comment** **Expense type** **Details** **Date** **Amount** **Requested**

Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	01. New Card		04/01/2026		

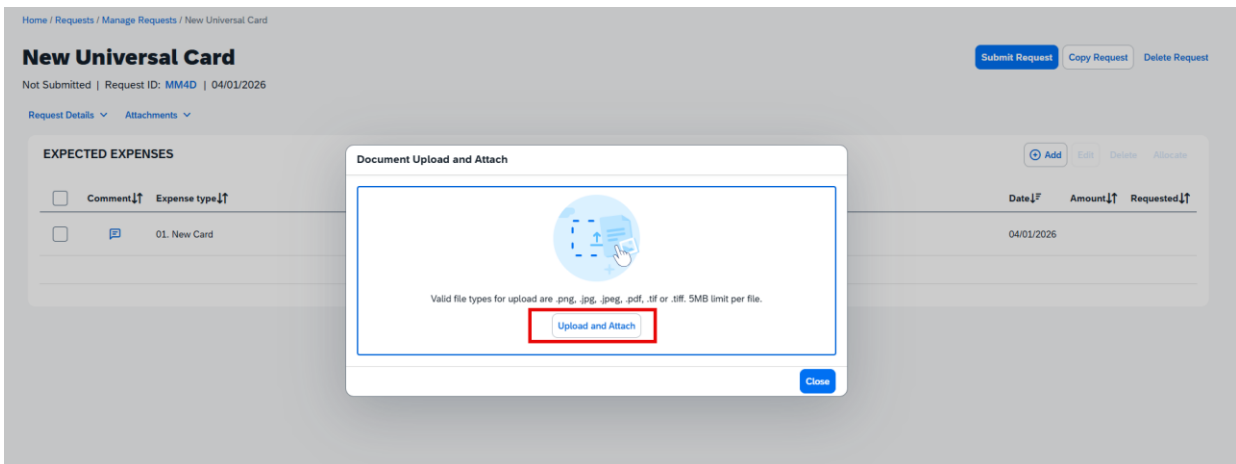
b. Select **Attach Documents** from the menu options.



c. The **Document Upload and Attach** window launches.

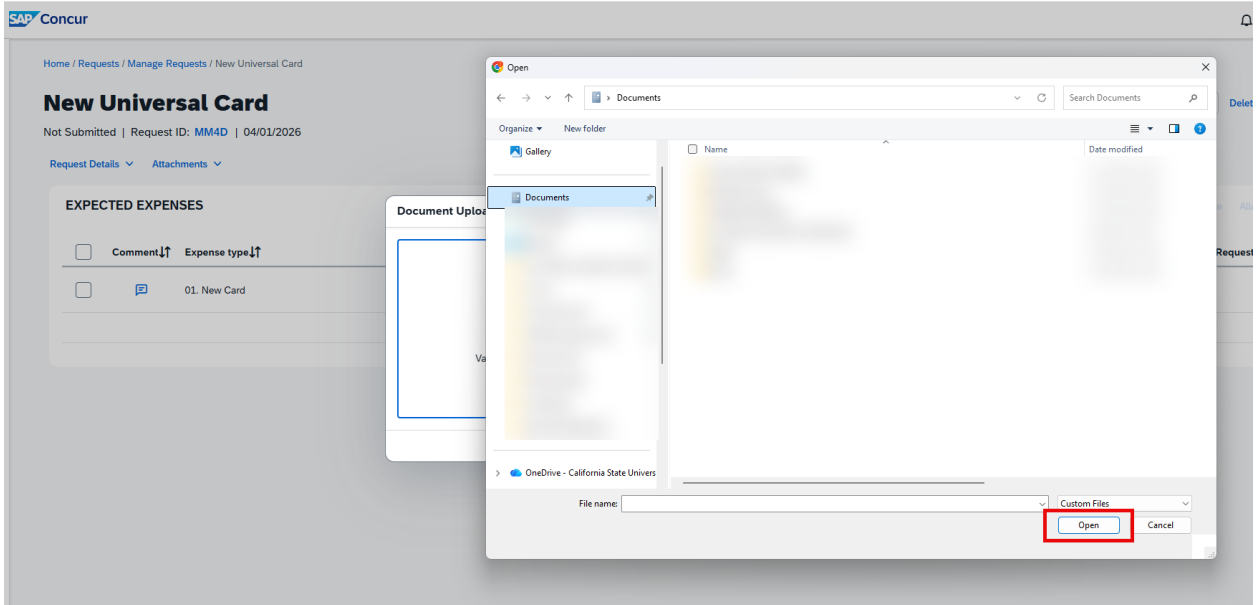


d. Select **Upload and Attach**.

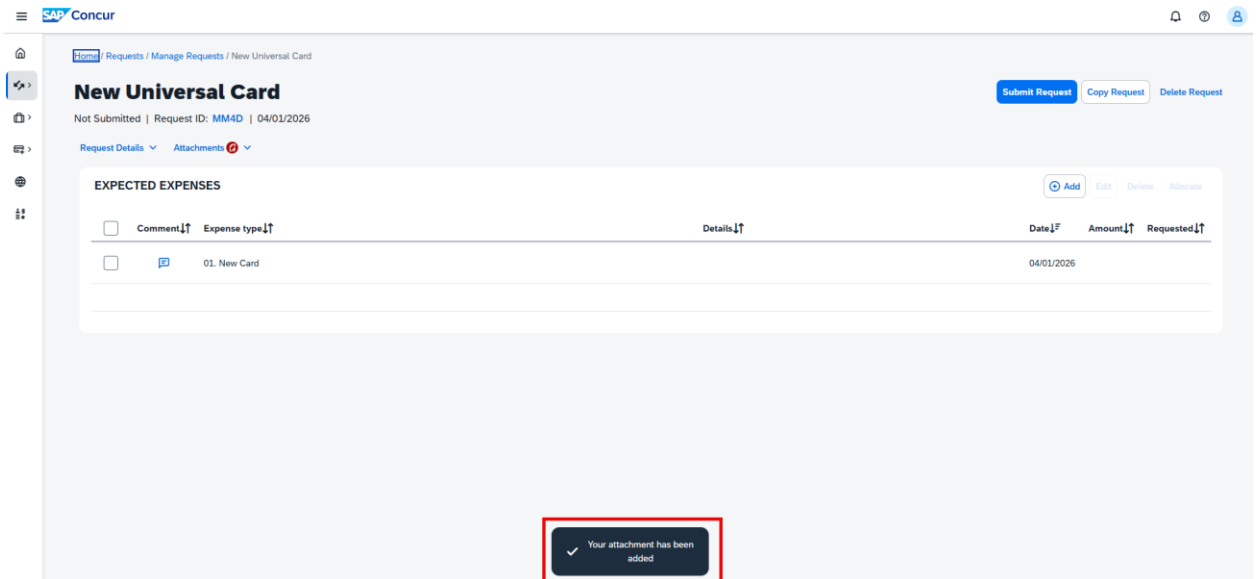


- e. Once you select **Upload and Attach** it will open your desktop file browser. Navigate to the location of your supporting documents, select the required file(s), and then click **Open** to attach them to your request.

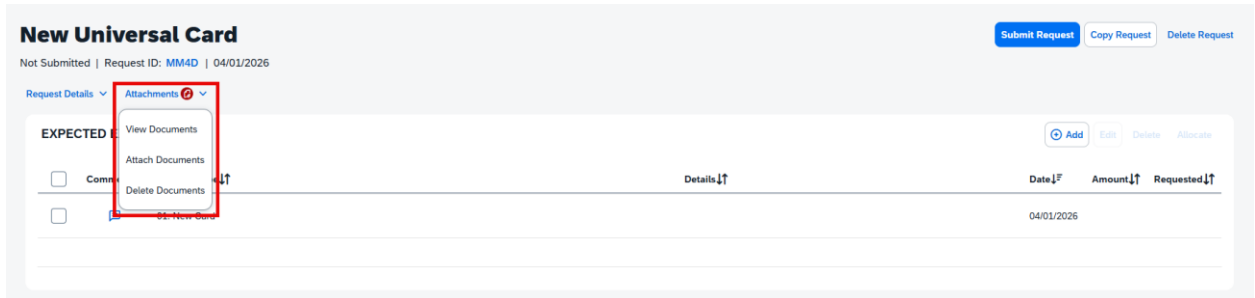
**Note:** Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.



- f. A message displays at the bottom of the page: **Your attachment has been added.**



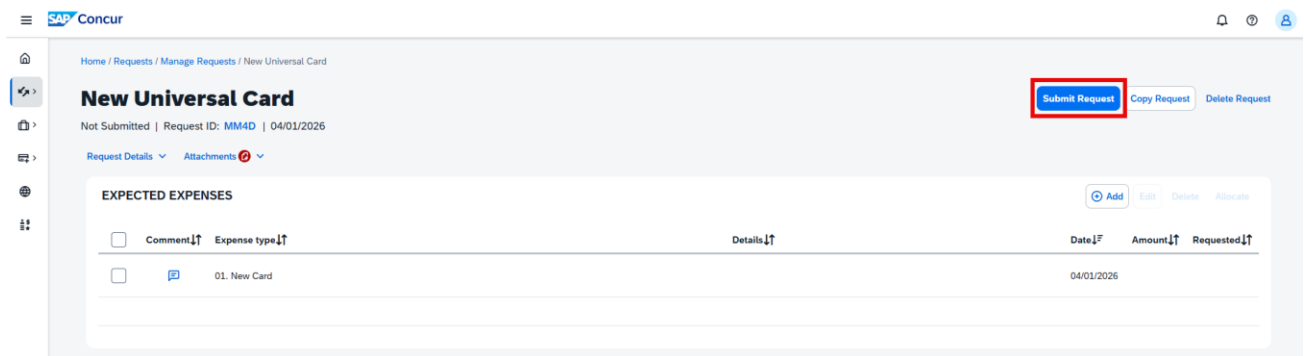
- g. Once documents are uploaded, a small red icon appears in the **Attachments** menu to indicate that the request contains attachments.



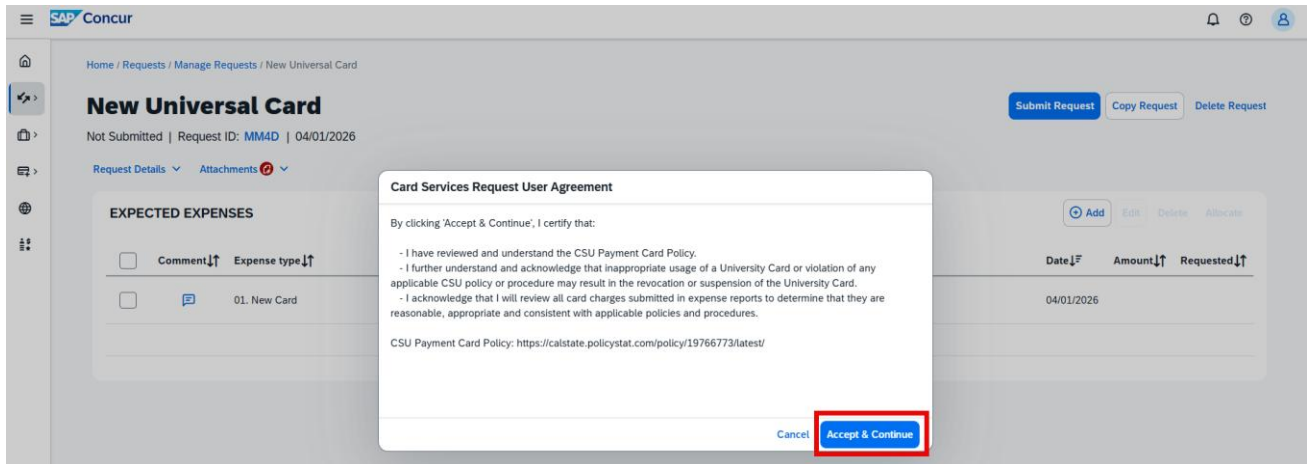
The menu then displays three options (View Documents, Attach Documents, and Delete Documents) allowing users to review, update, or remove previously uploaded files.

**Note:** The documents cannot be removed once the request has been submitted or approved; however, additional documents may be uploaded at any time.

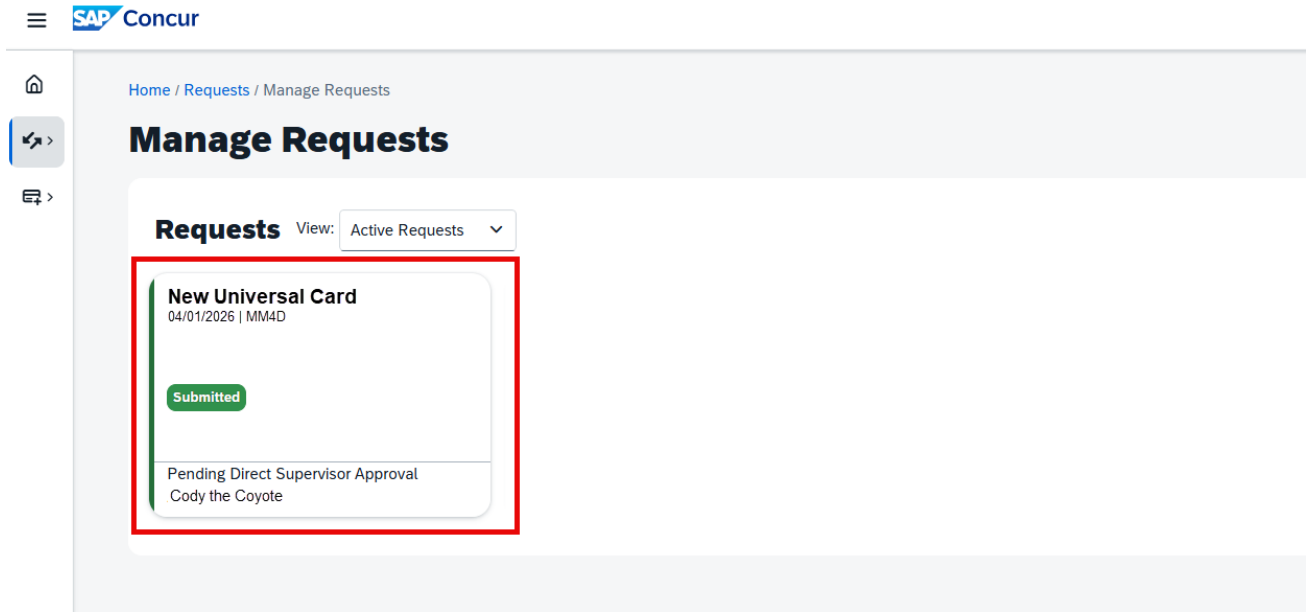
- 6. After completing the fields and attachments, click **Submit Request**.



- 7. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



8. The new **Request** is displayed under **Manage Requests**.

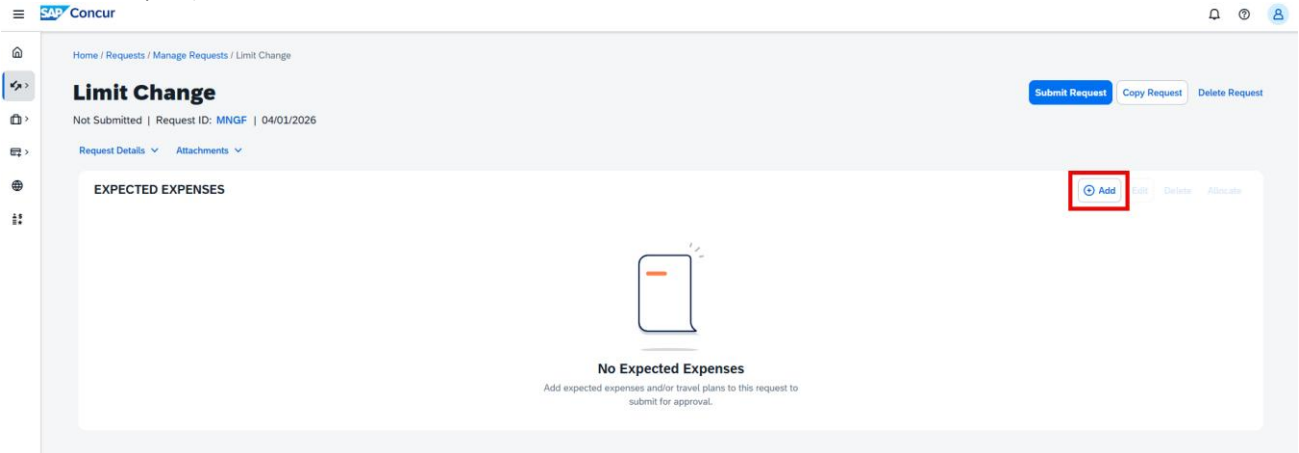


9. The approval workflow for a credit card service request depends on the type of service requested; for **New Card Requests**, the direct supervisor approval is required.

## Adding Card Service to Request – 02. Credit Limit Change

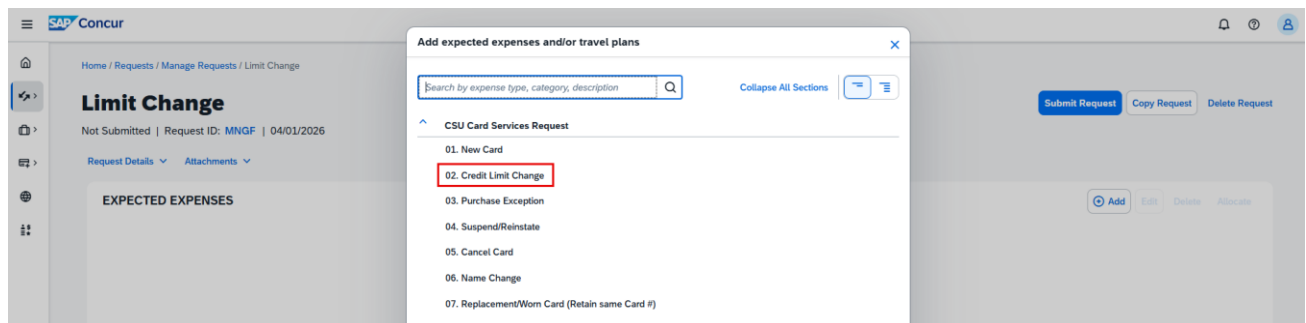
Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



The screenshot shows the SAP Concur interface for a 'Limit Change' request. The page title is 'Limit Change' and it indicates 'Not Submitted | Request ID: MNGF | 04/01/2026'. The main content area is titled 'EXPECTED EXPENSES' and contains a message: 'No Expected Expenses. Add expected expenses and/or travel plans to this request to submit for approval.' A red box highlights the '+ Add' button in the top right corner of the 'EXPECTED EXPENSES' section.

2. Select **02. Credit Limit Change** for your request.



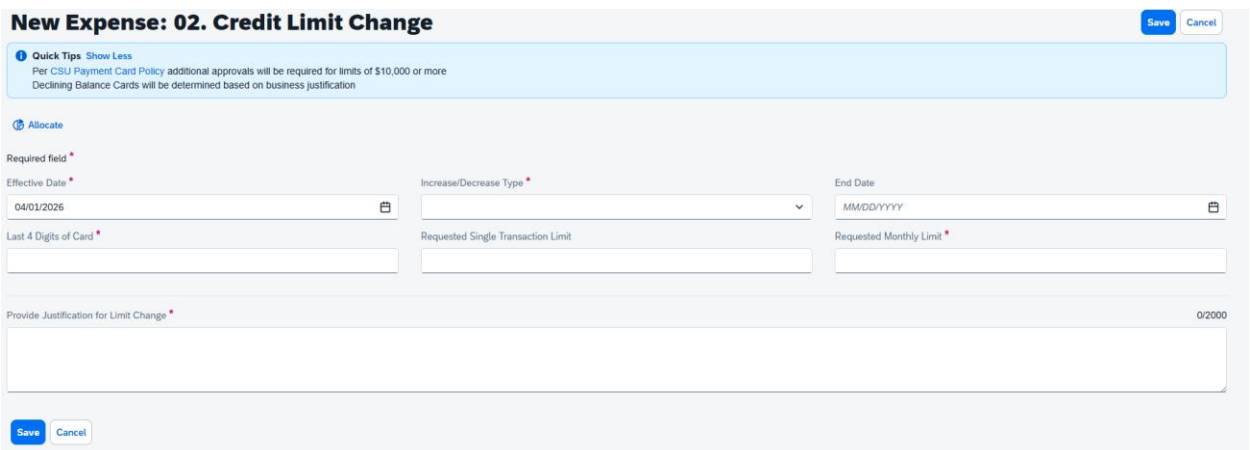
The screenshot shows the 'Add expected expenses and/or travel plans' dialog box. The dialog has a search bar and a list of 'CSU Card Services Request' options. The options are: 01. New Card, 02. Credit Limit Change (highlighted with a red box), 03. Purchase Exception, 04. Suspend/Reinstate, 05. Cancel Card, 06. Name Change, and 07. Replacement/Worn Card (Retain same Card #). The background shows the 'Limit Change' page with the 'Add' button highlighted.

3. The **New Expense** form for the selected service displays (e.g., Credit Limit Change).

**Note:** The form fields will differ based on the card service selected.

**Quick Tips (provided in blue)** display important information related to the details being requested.

- a. Request Layout



The screenshot shows the 'New Expense: 02. Credit Limit Change' form. The form has a blue header with 'Save' and 'Cancel' buttons. Below the header is a 'Quick Tips' section with the text: 'Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more. Declining Balance Cards will be determined based on business justification.' The form contains several fields: 'Effective Date' (04/01/2026), 'Increase/Decrease Type' (dropdown), 'End Date' (MMDD/YYYY), 'Last 4 Digits of Card', 'Requested Single Transaction Limit', and 'Requested Monthly Limit'. There is also a large text area for 'Provide Justification for Limit Change' with a character count of 0/2000. The form has 'Save' and 'Cancel' buttons at the bottom.

b. Review and complete all required fields (\*) and any optional fields, as desired.

Field Name	Description
<b>Effective Date*</b>	Enter the start date of the requested increase or decrease.
<b>Increase/Decrease Type*</b>	Select whether the request is temporary or permanent, and an increase or decrease.
<b>End Date (if applicable)</b>	For temporary changes, provide the end date of the request.
<b>Last 4 Digits of Card*</b>	Enter the last four digits of the Universal Card account number.
<b>Requested Single Transaction Limit</b>	Indicate the single transaction limit requested.
<b>Requested Monthly Limit*</b>	Indicate the monthly limit requested.
<b>Provide Justification for Limit Change*</b>	Provide a clear and detailed business reason supporting the request.

**Note:** Permanent limit increases must align with the Tiers outlined in the Universal Card Handbook:

- Tier 2: \$5,000 credit limit and \$2,500 single transaction limit
- Tier 3: \$10,000 credit limit and \$3,500 single transaction limit.

If only a single transaction limit increase is being requested, enter “current monthly limit” in the Monthly Limit field to indicate that no additional monthly credit is required.

Home / Requests / Manage Requests / Limit Change / New Expense: 02. Credit Limit Change

### New Expense: 02. Credit Limit Change

**Quick Tips** [Show Less](#)  
Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more  
Declining Balance Cards will be determined based on business justification

[Allocate](#)

Required field \*

Effective Date \*

Last 4 Digits of Card \*

Provide Justification for Limit Change \*

**Select Type of Increase/Decrease**

Increase/Decrease Type \*

- Permanent Decrease
- Permanent Increase
- Temporary Increase

End Date

Requested Monthly Limit \*

4. Click **Save**. The **Expected Expenses** screen displays.

**Note:** Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.

Home / Requests / Manage Requests / Limit Change / New Expense: 02. Credit Limit Change

### New Expense: 02. Credit Limit Change

**Quick Tips Show Less**  
Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more Declining Balance Cards will be determined based on business justification

**Allocate**

Required field \*

Effective Date \*  **Enter Start Date of Request**

Increase/Decrease Type \*

End Date  **Enter End Date of Request, if applicable**

Last 4 Digits of Card \*

Requested Single Transaction Limit

Requested Monthly Limit \*

Provide Justification for Limit Change \*  0/2000

5. After completing the fields, click **Submit Request**.

Home / Requests / Manage Requests / Limit Change

**Alerts: 1**

### Limit Change

Not Submitted | Request ID: MNGF | 04/01/2026

Request Details ▾ Attachments ▾

<input type="checkbox"/>	Alert	Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	⚠	📄	02. Credit Limit Change		04/01/2026		

6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.

Home / Requests / Manage Requests / Limit Change

### Limit Change

Not Submitted | Request ID: MNGF | 04/01/2026

Request Details ▾ Attachments ▾

<input type="checkbox"/>	Comment	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	📄	02. Credit Limit Change		04/01/2026		

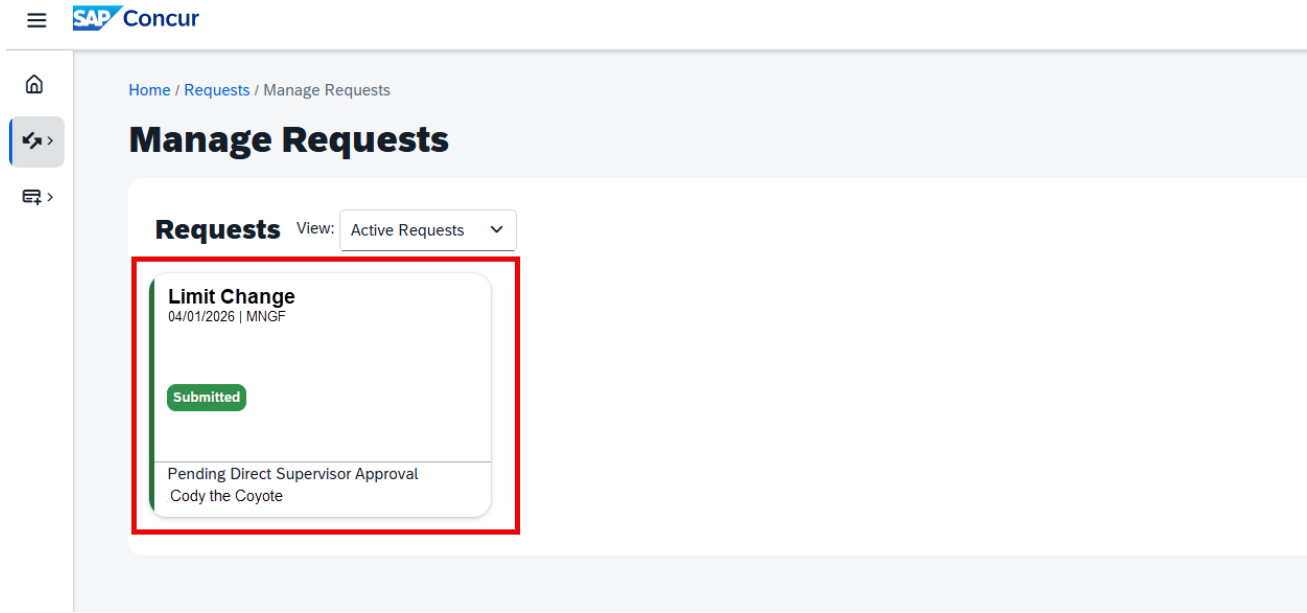
**Card Services Request User Agreement**

By clicking 'Accept & Continue', I certify that:

- I have reviewed and understand the CSU Payment Card Policy.
- I further understand and acknowledge that inappropriate usage of a University Card or violation of any applicable CSU policy or procedure may result in the revocation or suspension of the University Card.
- I acknowledge that I will review all card charges submitted in expense reports to determine that they are reasonable, appropriate and consistent with applicable policies and procedures.

CSU Payment Card Policy: <https://calstate.policystat.com/policy/19766773/latest/>

7. The new **Request** is displayed under **Manage Requests**.



8. The approval workflow for a credit card service request depends on the type of service requested; requests for monthly limits above the CSU Payment Card Policy threshold require DOA or budget owner approval.

9. To review the approval flow, see the [Request Timeline](#) section below for instructions.

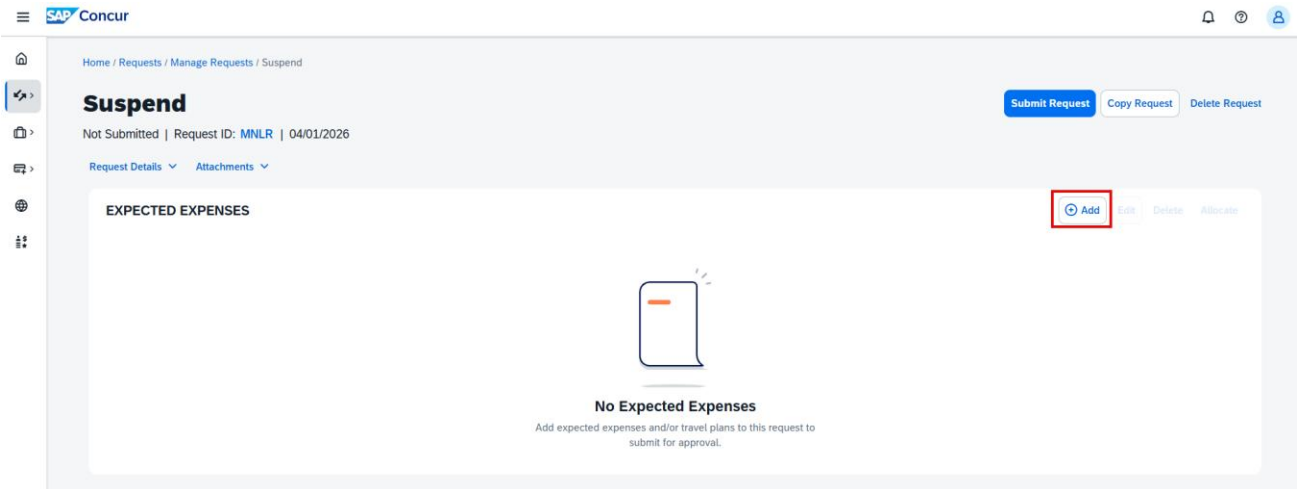
***Adding Card Service to Request – 03. Purchase Exception (DO NOT USE)***

The **Purchase Exception** option (Option 03) is not used for Universal Card requests. **DO NOT SELECT THIS OPTION.** Please choose the appropriate request type from the available options to ensure proper processing.

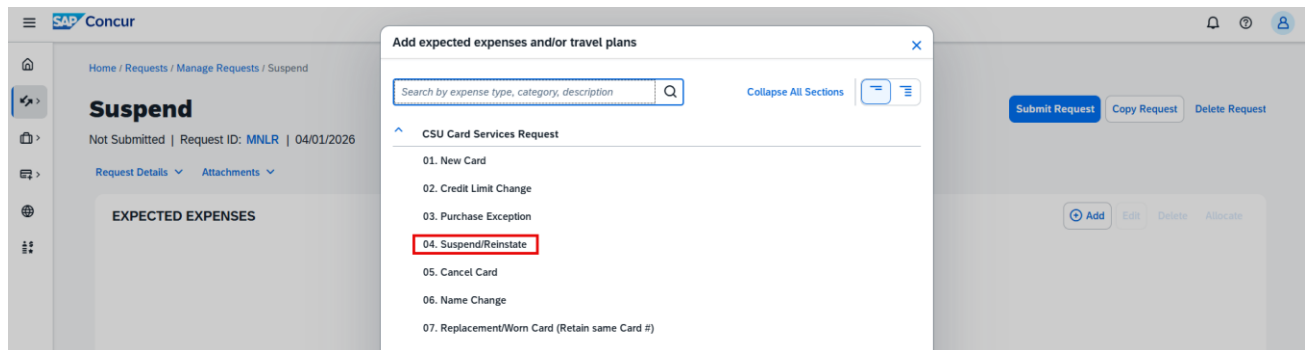
## Adding Card Service to Request – 04. Suspend/Reinstate

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **04. Suspend/Reinstate** for your request.



3. The **New Expense** form for the selected service displays (e.g., Suspend/Reinstate).

**Note:** The form fields will differ based on the card service selected.

- a. Request Layout

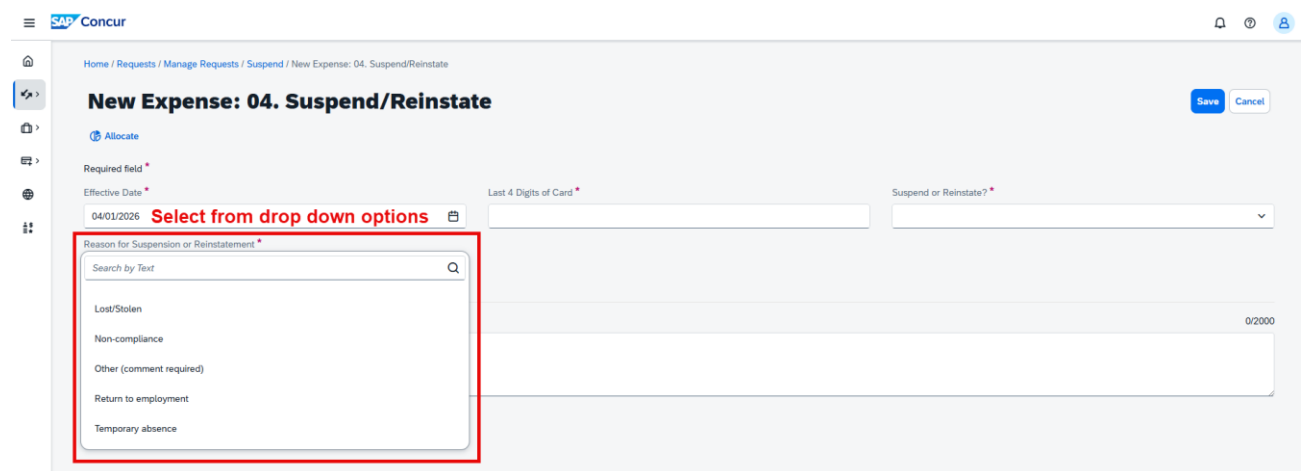
b. Review and complete all required fields (\*) and any optional fields, as desired.

Field Name	Description
<b>Effective Date*</b>	Enter the start date of the request.
<b>Last 4 Digits of Card*</b>	Enter the last four digits of the Universal Card account number.
<b>Suspend or Reinstatement?*</b>	Specify whether the request is suspend or reinstate.
<b>Reason for Suspension or Reinstatement*</b>	<p>Select the appropriate reason from the list below:</p> <ul style="list-style-type: none"> <li>• Lost/Stolen: Use this option to report your lost or stolen Universal Card to the Universal Card Team. <b>IMPORTANT: Please call US Bank immediately to report your lost or stolen credit card at 1-800-344-5696.</b></li> <li>• Non-Compliance: <b>DO NOT SELECT THIS OPTION.</b></li> <li>• Other (comment required): Please complete the comment section to explain in detail.</li> <li>• Return to employment: Use this option to return a card to active use.</li> <li>• Temporary absence: Use this option to temporarily suspend an active card while the cardholder is on extended leave or vacation.</li> </ul>
<b>Additional Information</b>	Include any supporting details or context.

**Note:** Reinstatement allows a card to be reactivated following a temporary suspension, while Suspend allows a card to be temporarily deactivated and should be used when the cardholder will be on an extended leave or vacation.

4. Click **Save**. The **Expected Expenses** screen displays.

**Note:** Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.



Home / Requests / Manage Requests / Suspend / New Expense: 04. Suspend/Reinstate

## New Expense: 04. Suspend/Reinstate

Allocate

Required field \*

Effective Date \* 04/01/2026

Last 4 Digits of Card \* Last four of Universal Card Account Number

Reason for Suspension or Reinstatement \*  
 Select from drop down options

Suspend or Reinstate? \*  
 Search by Text  
 Reinstate  
 Suspend

Additional Information  
 Include any supporting details or context

Save Cancel

5. After completing the fields, click **Submit Request**.

Home / Requests / Manage Requests / Suspend

## Suspend

Not Submitted | Request ID: MNLR | 04/01/2026

Request Details Attachments

Submit Request Copy Request Delete Request

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> 04. Suspend/Reinstate		04/01/2026		

6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.

Home / Requests / Manage Requests / Suspend

## Suspend

Not Submitted | Request ID: MNLR | 04/01/2026

Request Details Attachments

Submit Request Copy Request Delete Request

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> 04. Suspend/Reinstate		04/01/2026		

**Card Services Request User Agreement**

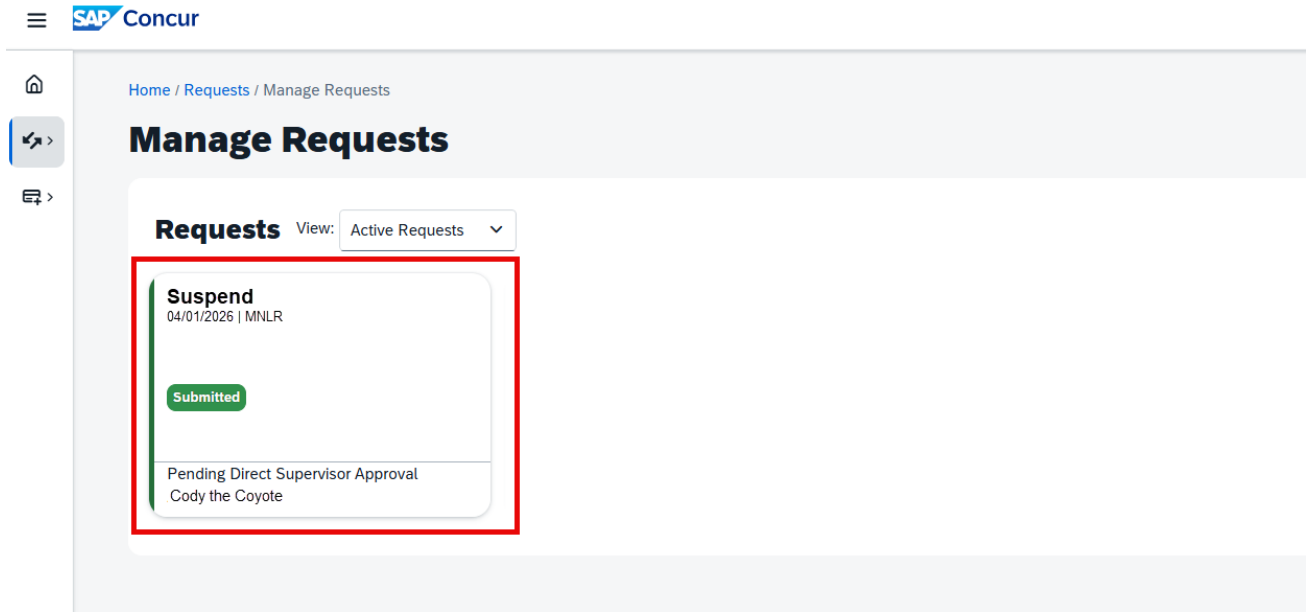
By clicking 'Accept & Continue', I certify that:

- I have reviewed and understand the CSU Payment Card Policy.
- I further understand and acknowledge that inappropriate usage of a University Card or violation of any applicable CSU policy or procedure may result in the revocation or suspension of the University Card.
- I acknowledge that I will review all card charges submitted in expense reports to determine that they are reasonable, appropriate and consistent with applicable policies and procedures.

CSU Payment Card Policy: <https://calstate.policystat.com/policy/19766773/latest/>

Cancel Accept & Continue

7. The new **Request** is displayed under **Manage Requests**.



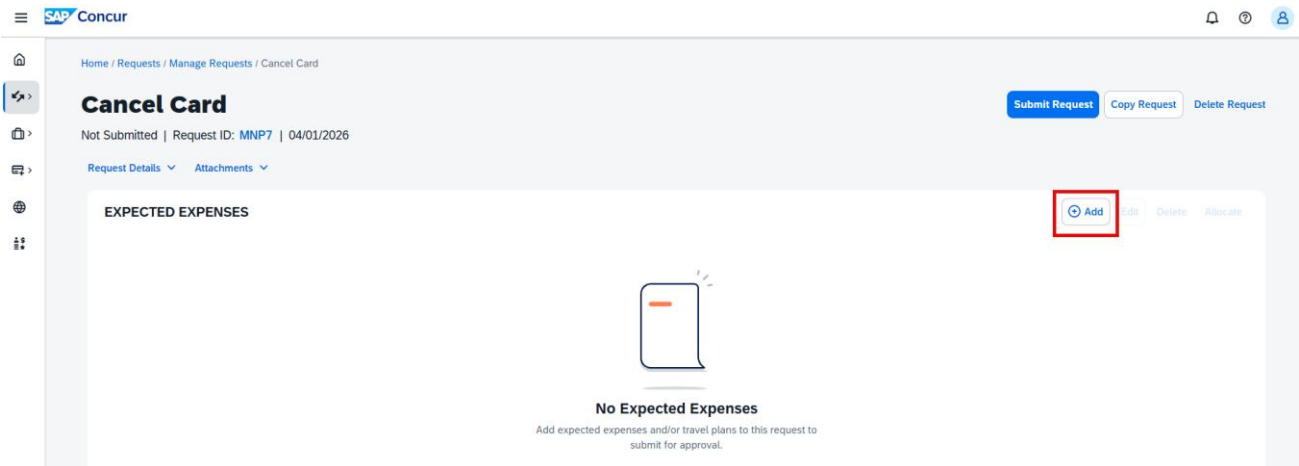
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the [Request Timeline](#) section below for instructions.

## Adding Card Service to Request – 05. Cancel Card

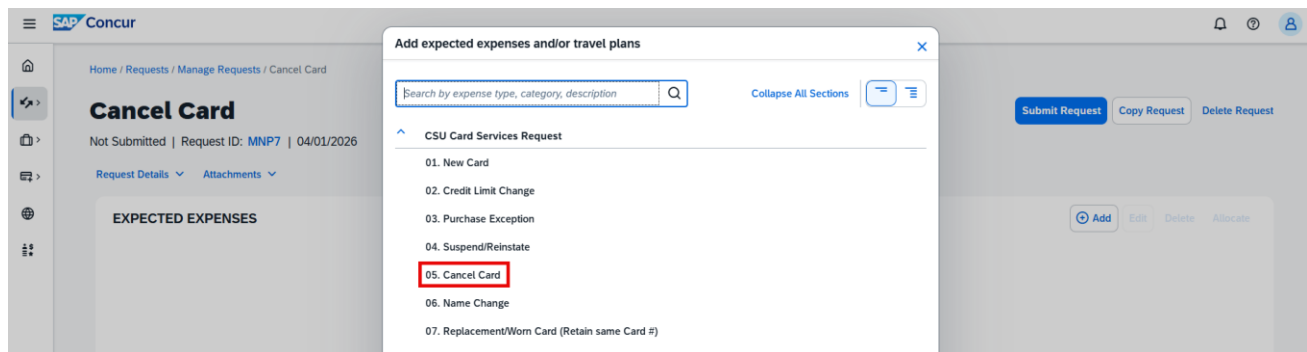
Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



The screenshot shows the SAP Concur interface for a 'Cancel Card' request. The breadcrumb trail is 'Home / Requests / Manage Requests / Cancel Card'. The page title is 'Cancel Card'. Below the title, it says 'Not Submitted | Request ID: MNP7 | 04/01/2026'. There are three buttons: 'Submit Request', 'Copy Request', and 'Delete Request'. The main section is titled 'EXPECTED EXPENSES' and contains a red box around the '+ Add' button. Below this, there is a message: 'No Expected Expenses' and 'Add expected expenses and/or travel plans to this request to submit for approval.'

2. Select **05. Cancel Card** for your request.

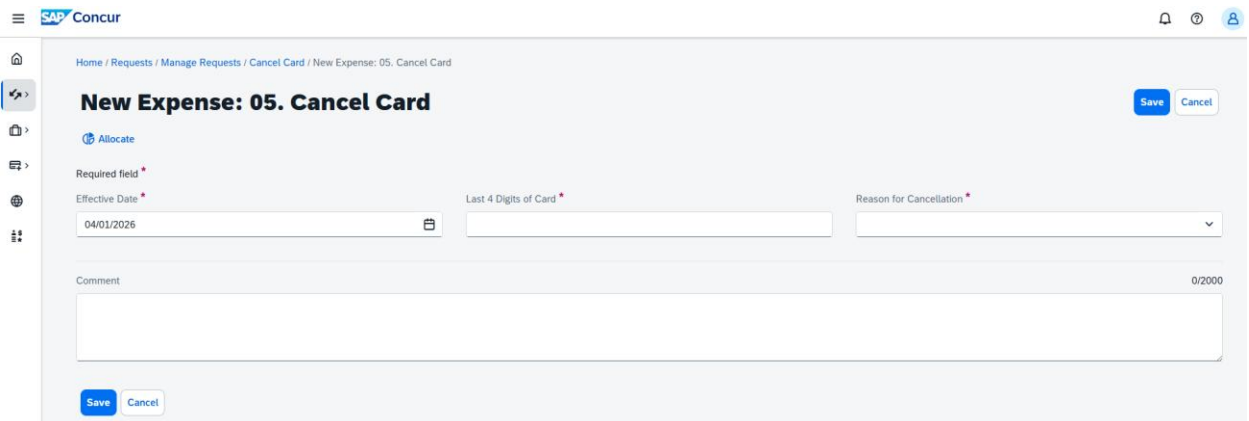


The screenshot shows the SAP Concur interface for a 'Cancel Card' request. The breadcrumb trail is 'Home / Requests / Manage Requests / Cancel Card'. The page title is 'Cancel Card'. Below the title, it says 'Not Submitted | Request ID: MNP7 | 04/01/2026'. There are three buttons: 'Submit Request', 'Copy Request', and 'Delete Request'. The main section is titled 'EXPECTED EXPENSES'. A modal window titled 'Add expected expenses and/or travel plans' is open, showing a search bar and a list of card services. The list includes: '01. New Card', '02. Credit Limit Change', '03. Purchase Exception', '04. Suspend/Reinstate', '05. Cancel Card' (highlighted with a red box), '06. Name Change', and '07. Replacement/Worn Card (Retain same Card #)'. There are also buttons for 'Collapse All Sections', '+', and '-'.

3. The **New Expense** form for the selected service displays (e.g., Cancel Card).

**Note:** The form fields will differ based on the card service selected. This request cancels your card account permanently. Please return your card to the Procurement Office (SH-125).

- a. Request Layout



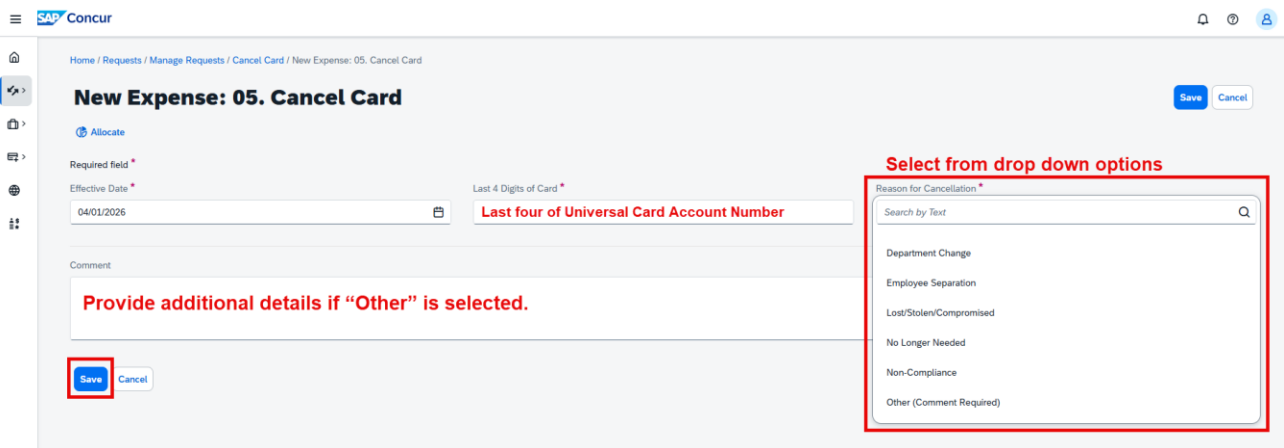
The screenshot shows the SAP Concur interface for a 'New Expense: 05. Cancel Card' request. The breadcrumb trail is 'Home / Requests / Manage Requests / Cancel Card / New Expense: 05. Cancel Card'. The page title is 'New Expense: 05. Cancel Card'. There are two buttons: 'Save' and 'Cancel'. Below the title, there is an 'Allocate' button. The form has three required fields: 'Effective Date' (with a calendar icon and the value '04/01/2026'), 'Last 4 Digits of Card', and 'Reason for Cancellation'. There is also a 'Comment' field with a character count of '0/2000'. At the bottom, there are 'Save' and 'Cancel' buttons.

b. Review and complete all required fields (\*) and any optional fields, as desired.

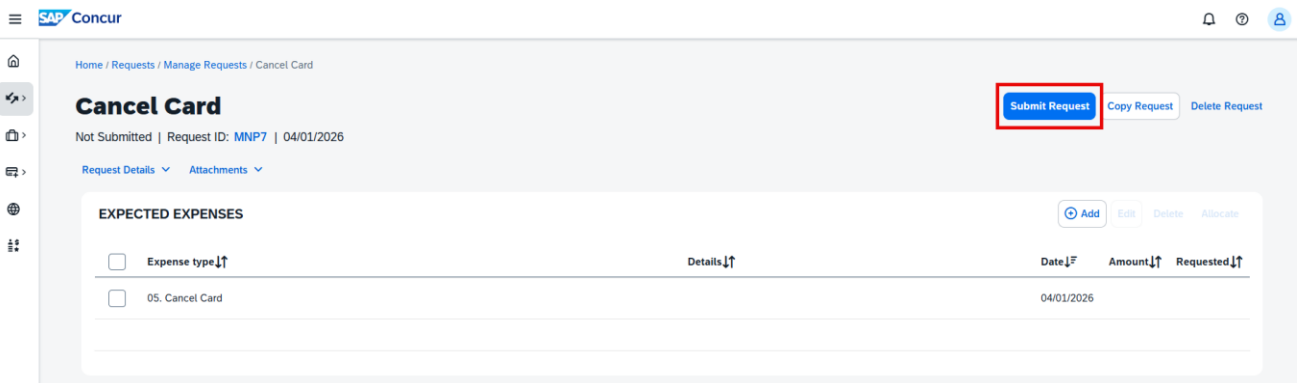
Field Name	Description
Effective Date*	Enter the start date of the request.
Last 4 Digits of Card*	Enter the last four digits of the Universal Card account number.
Reason for Cancellation*	Select the appropriate reason from the list below: <ul style="list-style-type: none"> <li>• Department Change</li> <li>• Employee Separation</li> <li>• Lost/Stolen/Compromised – <b>DO NOT SELECT THIS OPTION</b></li> <li>• No Longer Needed</li> <li>• Non-Compliance – <b>DO NOT SELECT THIS OPTION</b></li> <li>• Other (Comment Required)</li> </ul>
Comment	Provide additional details if “Other” is selected.

4. Click **Save**. The **Expected Expenses** screen displays.

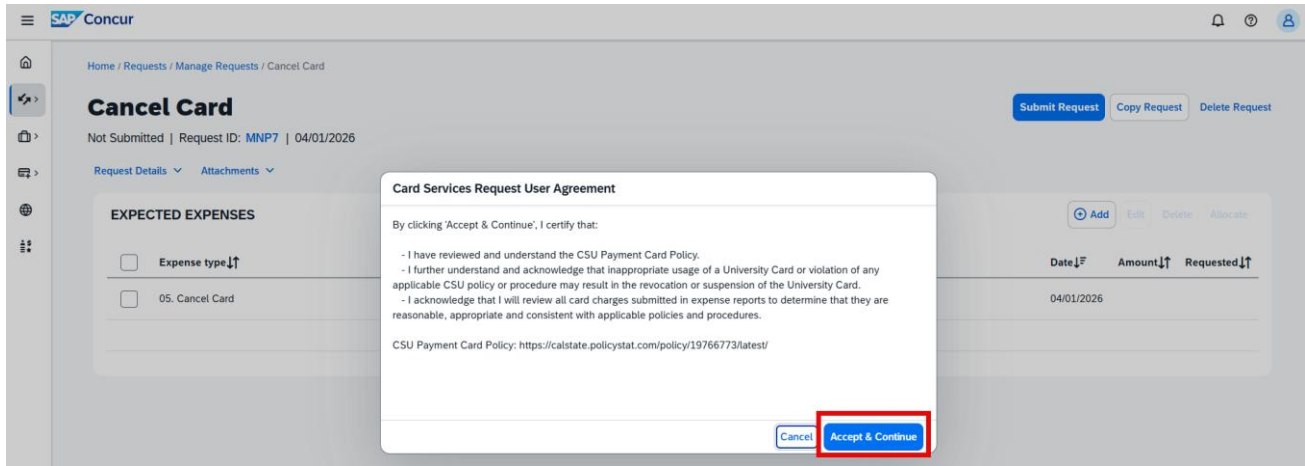
**Note:** Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.



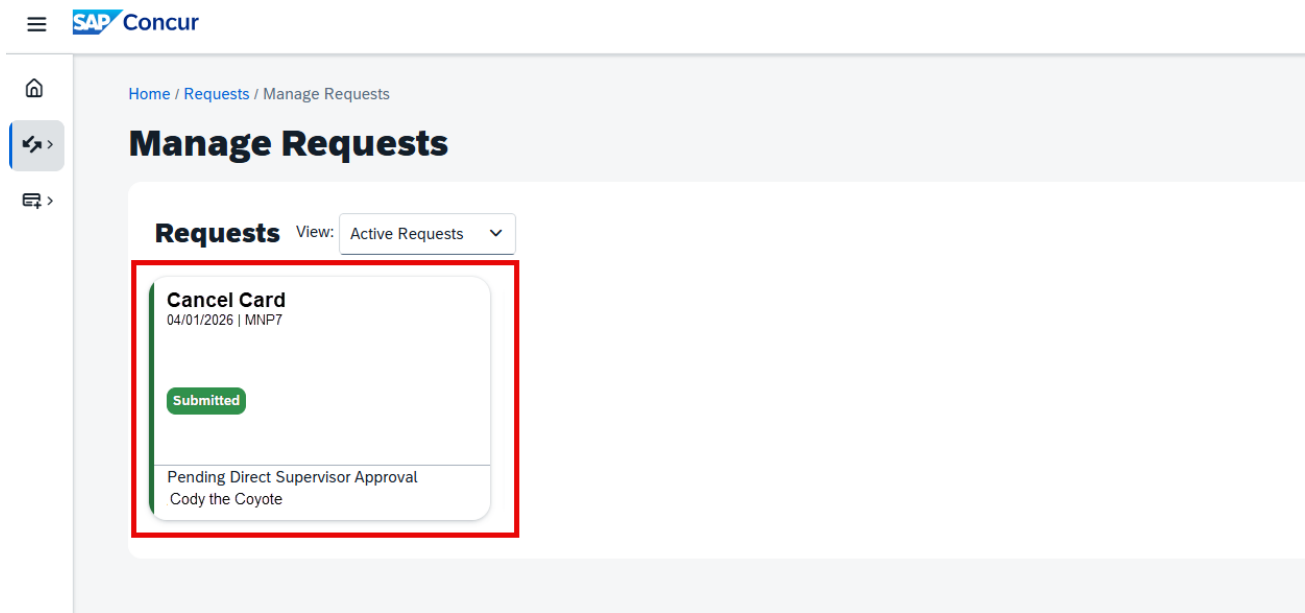
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.



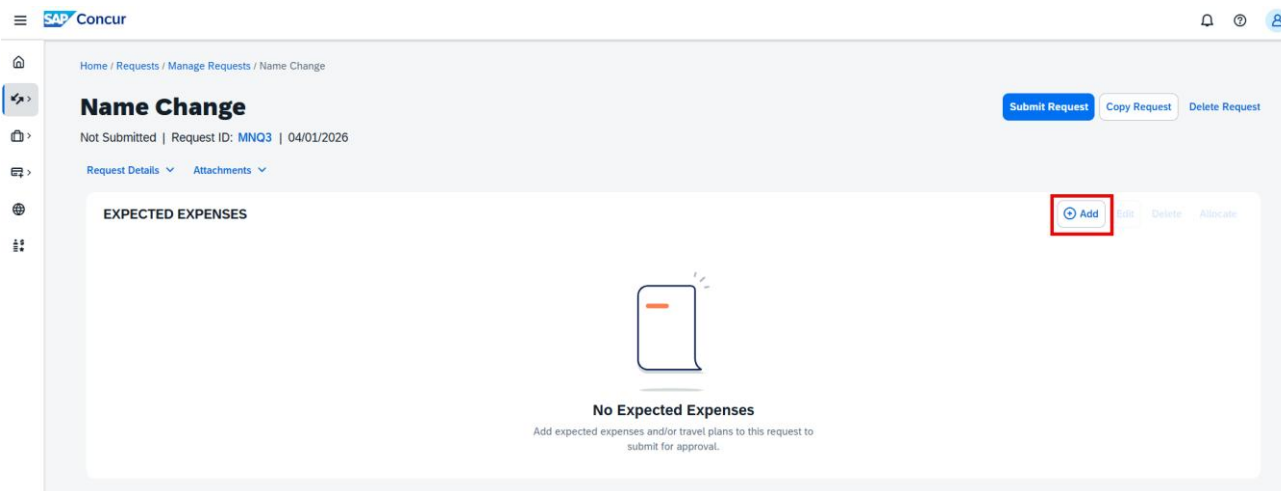
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the [Request Timeline](#) section below for instructions.

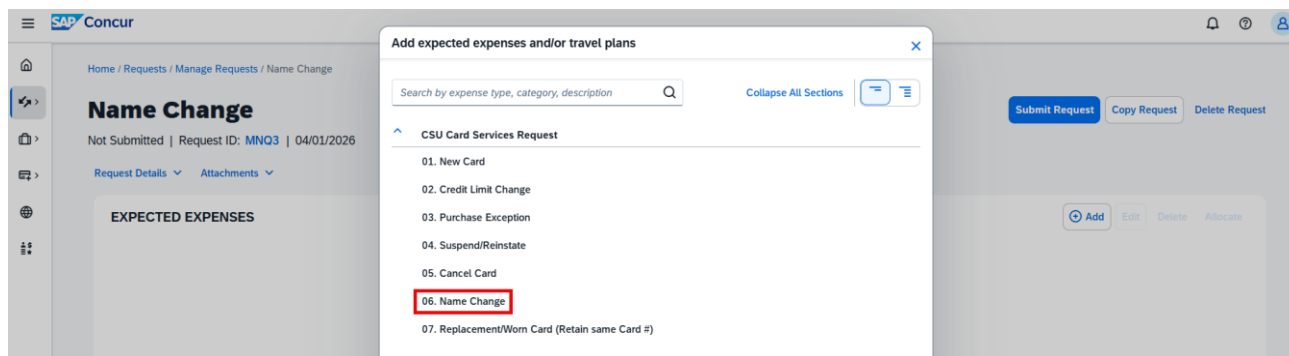
## Adding Card Service to Request – 06. Name Change

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **06. Name Change** for your request.



3. The **New Expense** form for the selected service displays (e.g., Name Change).

**Note:** The form fields will differ based on the card service selected.

The employee's name displayed in Concur is automatically populated from the CHRS database and should not be modified within this request form. If the name shown is incorrect, the employee must contact Human Resources (HR) to update their official record. Once the name has been updated in CHRS, a Name Change Request may be submitted to ensure the updated name is reflected on the physical Universal Card.

a. Request Layout

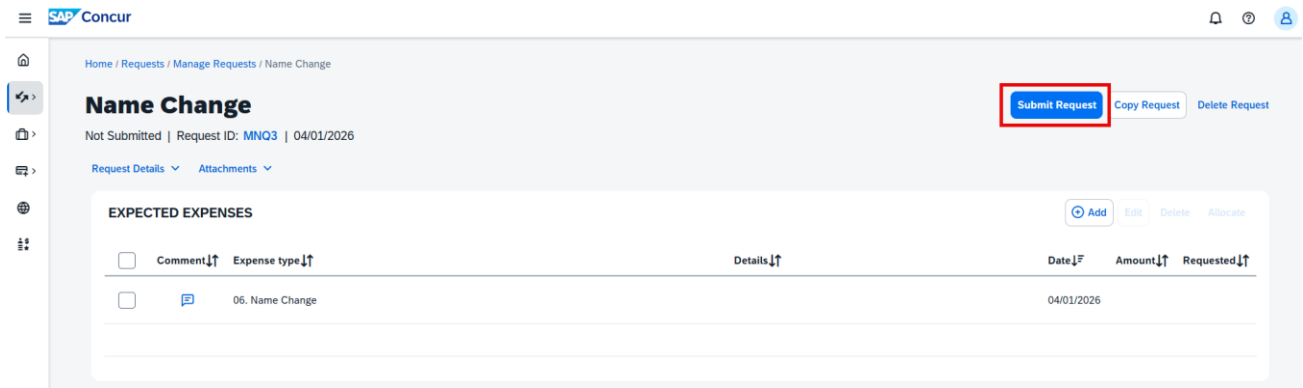
b. Review and complete all required fields and any optional fields, as desired.

Field Name	Description
<b>Effective Date*</b>	Automatically populated from the Request Header.
<b>Last 4 Digits of Card*</b>	Enter the last four digits of the Universal Card account number.
<b>Existing Name on Card*</b>	Provide full name as it appears on your current physical card.
<b>New Employee First Name*</b>	This data is automatically populated from CHRS; verify accuracy before submitting.
<b>New Employee Middle Name/Initial</b>	Enter if applicable, and if you would like the information to be reflected on your physical card.
<b>New Employee Last Name*</b>	This data is automatically populated from CHRS; verify accuracy before submitting.
<b>Reason for Name Change on Card*</b>	Provide the reason for the update (e.g., legal name change).

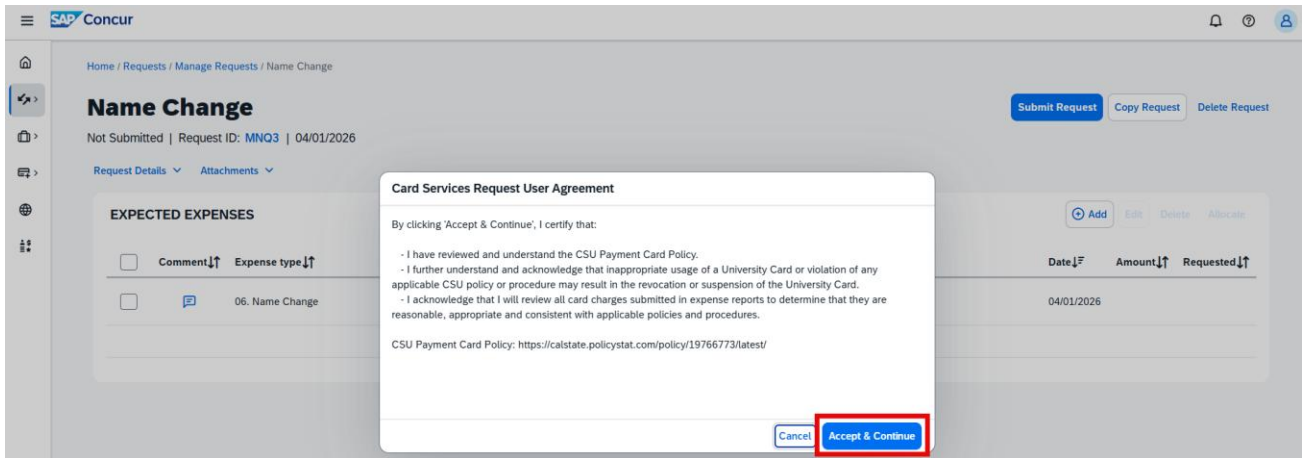
4. Click **Save**. The **Expected Expenses** screen displays.

**Note:** Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.

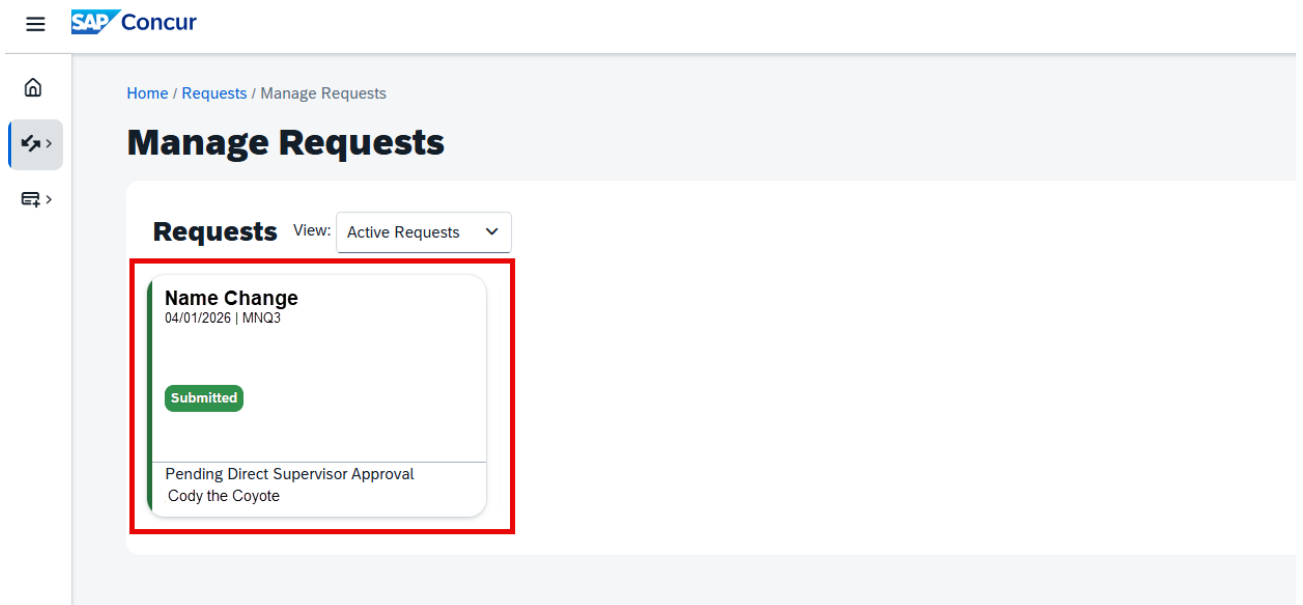
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new **Request** is displayed under **Manage Requests**.



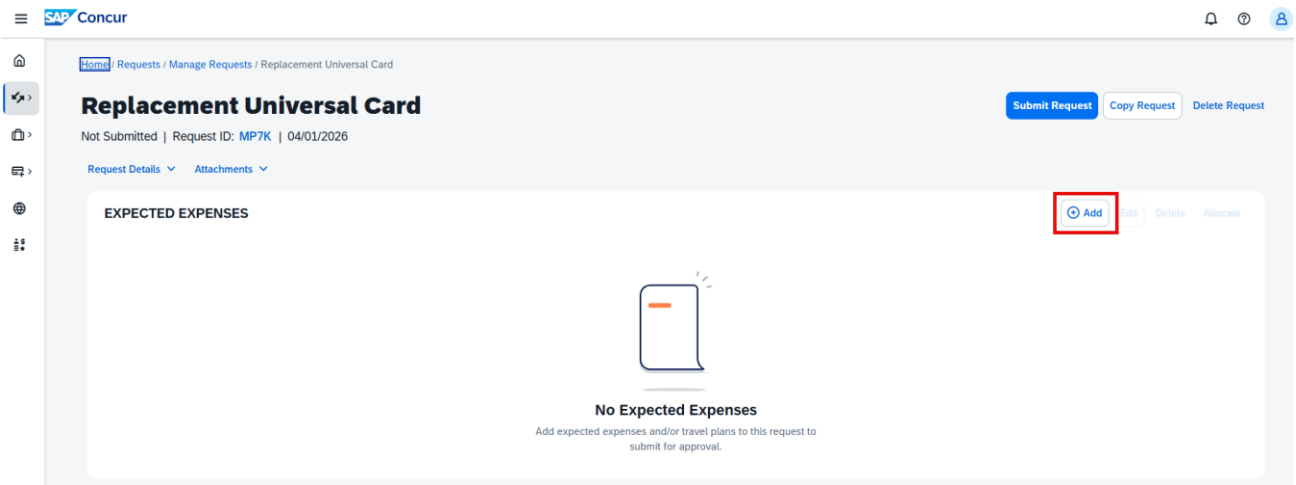
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the [Request Timeline](#) section below for instructions.

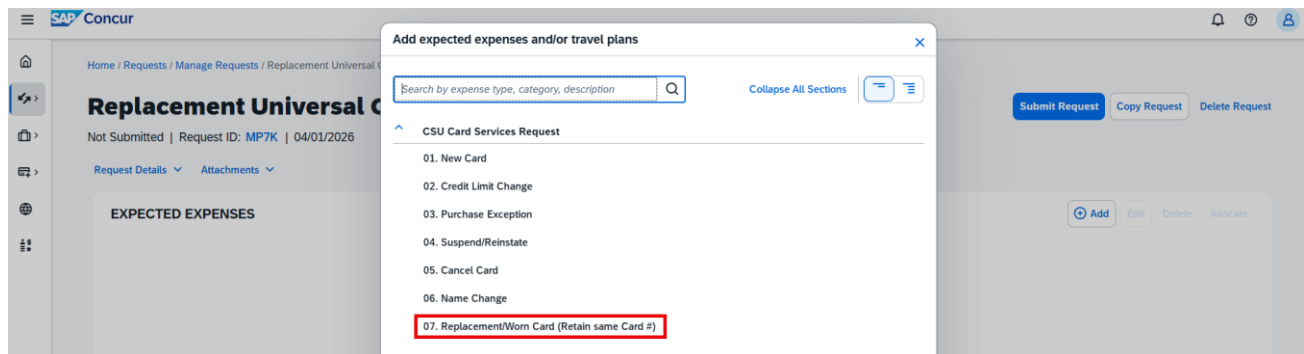
## Adding Card Service to Request – 07. Replacement/Worn Card (Retain same Card #)

Although the card service is not an expected expense, there is no ability in Concur to modify the name from **Expected Expenses**. The functionality to add services is similar to other request forms.

1. The **Expected Expenses** screen displays. Click **+ Add** (Only one card service **Expected Expenses** type should be added to submit the Request).



2. Select **07. Replacement/Worn Card (Retain same Card #)** for your request.



3. The **New Expense** form for the selected service displays (e.g., Replacement/Worn Card (Retain same Card #)).

**Note:** The form fields will differ based on the card service selected.

Use this option to report your replacement Universal Card to the Universal Card Team. **IMPORTANT: Please call US Bank to request your replacement Universal Card at 1-800-344-5696. US Bank will order a replacement card that will be delivered to the Procurement Office (SH-125). The Cardholder must return the worn out/damaged card to the Universal Card Team to be destroyed. The Cardholder will be notified to pick up the replacement card from the Universal Card Team.**

a. Request Layout

The screenshot shows the SAP Concur interface for a 'New Expense' request. The title is 'New Expense: 07. Replacement/Worn Card (Retain same Card #)'. There are 'Save' and 'Cancel' buttons in the top right. The form includes a 'Required field' section with three input fields: 'Effective Date' (with a calendar icon and the value '04/01/2026'), 'Last 4 Digits of Card', and 'Reason for Card Replacement' (a dropdown menu). Below these is a 'Comment' field with a character count of '0/2000'. A 'Save' button is highlighted in blue at the bottom left.

b. Review and complete all required fields (\*) and any optional fields, as desired.

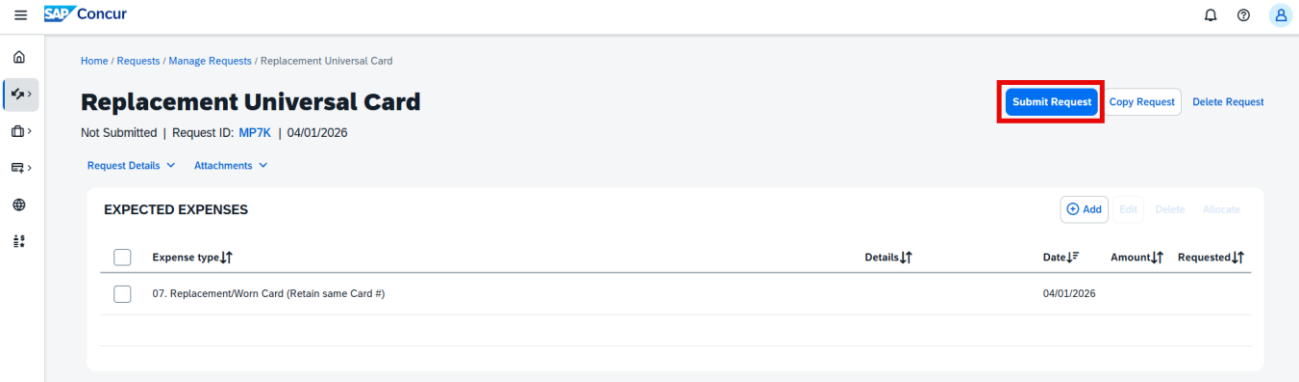
Field Name	Description
<b>Effective Date*</b>	Enter the start date of the request.
<b>Last 4 Digits of Card*</b>	Enter the last four digits of the Universal Card account number.
<b>Reason for Card Replacement*</b>	Select the appropriate reason from the list below: <ul style="list-style-type: none"> <li>• Chip Malfunction</li> <li>• Damaged Card</li> <li>• Worn Magnetic Strip</li> </ul>
<b>Comment</b>	Provide additional details if applicable.

4. Click **Save**. The **Expected Expenses** screen displays.

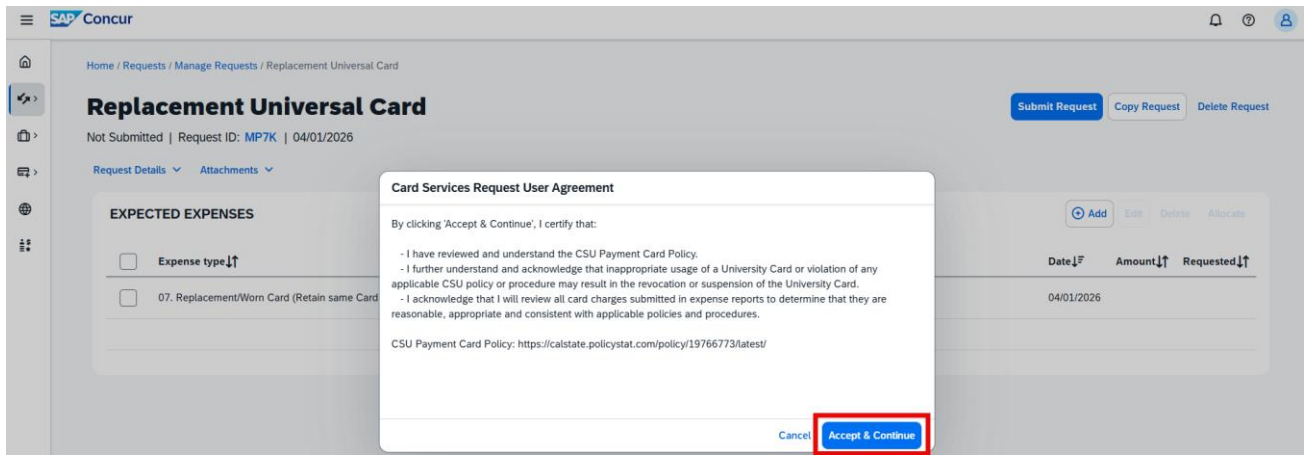
**Note:** Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.

This screenshot is similar to the one above but includes several annotations. A red box highlights the 'Save' button at the bottom left. A red text annotation 'Last four of Universal Card Account Number' is placed below the 'Last 4 Digits of Card' field. Another red text annotation 'Provide additional details if applicable.' is placed below the 'Comment' field. A red box highlights the 'Reason for Card Replacement' dropdown menu, which is open to show a list of options: 'Chip Malfunction', 'Damaged Card', and 'Worn Magnetic Strip'. A red text annotation 'Select from drop down options' is placed above the dropdown menu.

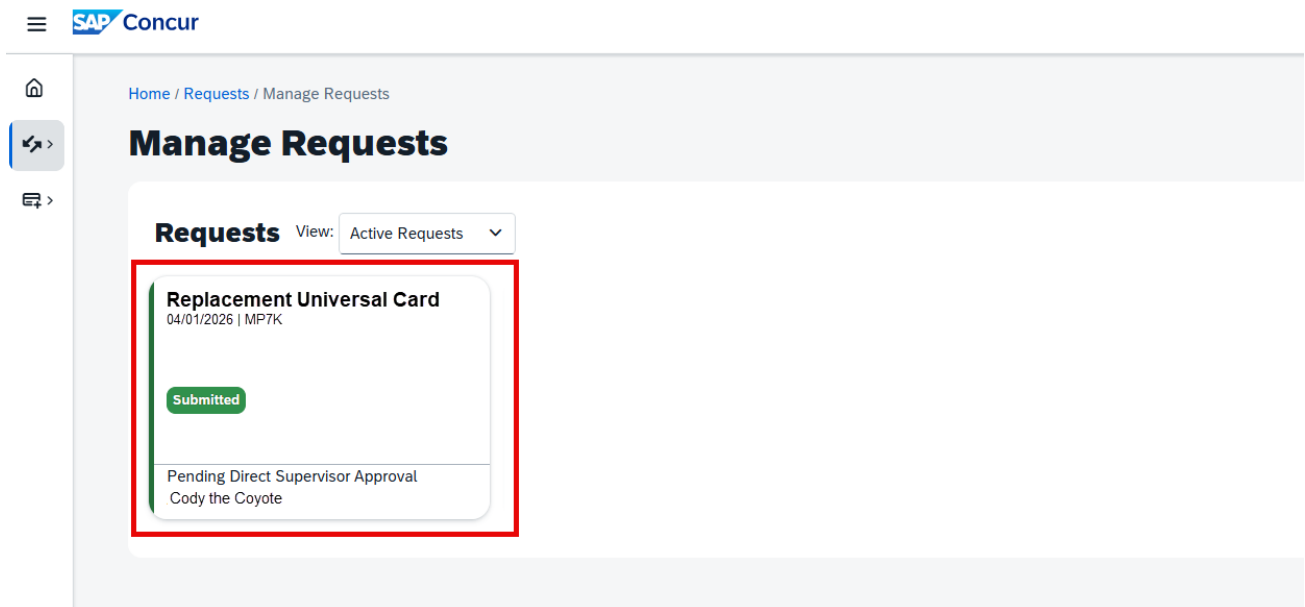
5. After completing the fields, click **Submit Request**.



6. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.



7. The new Request is displayed under **Manage Requests**.



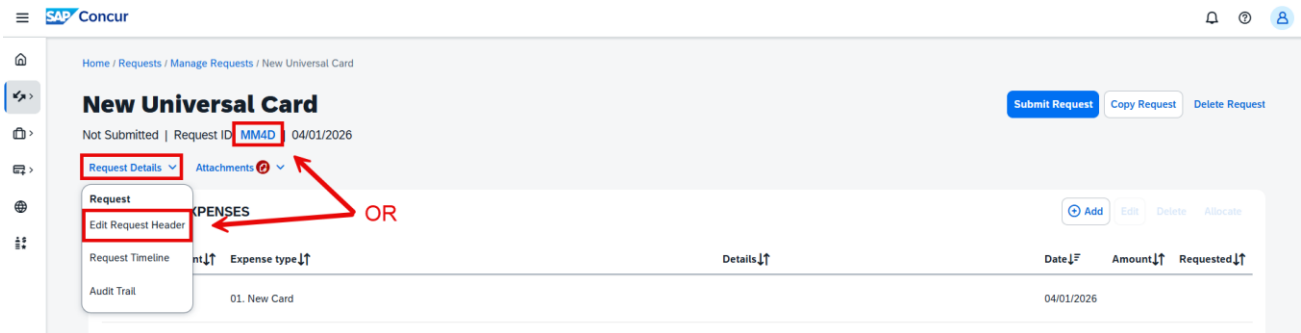
8. The approval workflow for a credit card service request depends on the type of service requested; this request is routed directly to the Card Administrator.

9. To review the approval flow, see the [Request Timeline](#) section below for instructions.

# Request Details

## Edit Request Header

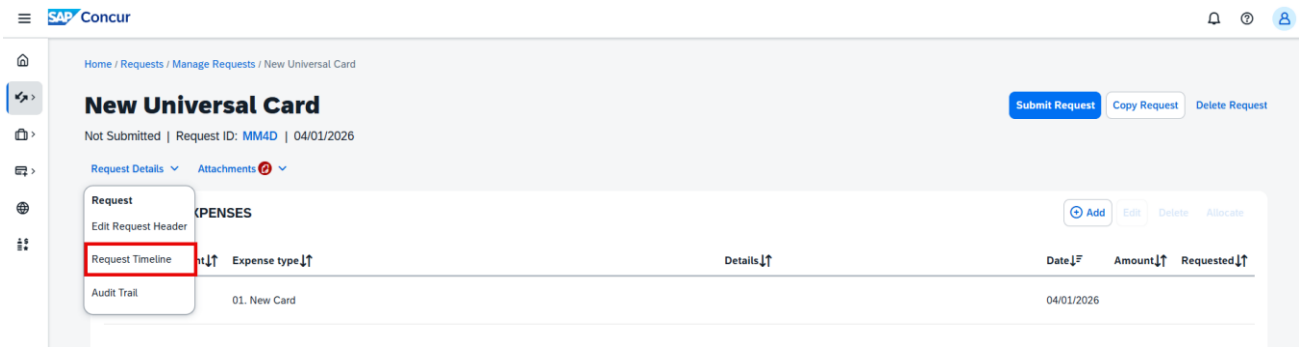
1. Select **Request Details**, then choose **Edit Request Header** or select the **Request ID** to open and update the request.



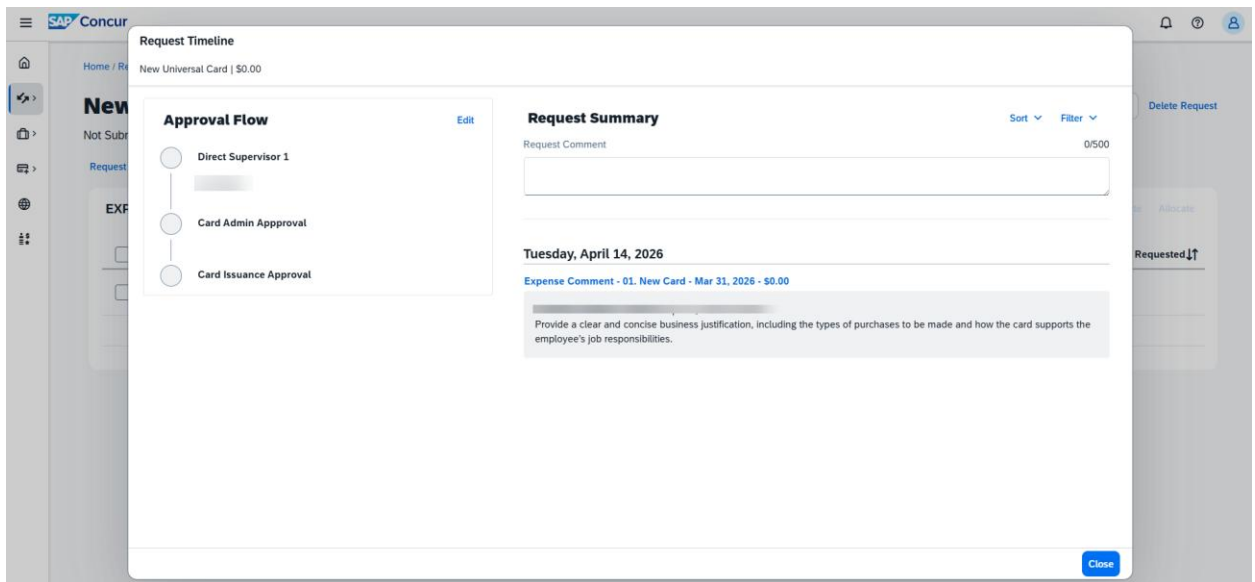
## View Request Timeline

The timeline displays the approval workflow and identifies the steps which have been completed or are outstanding.

1. Select **Request Details**, then choose **Request Timeline** to view the status and history of the request.



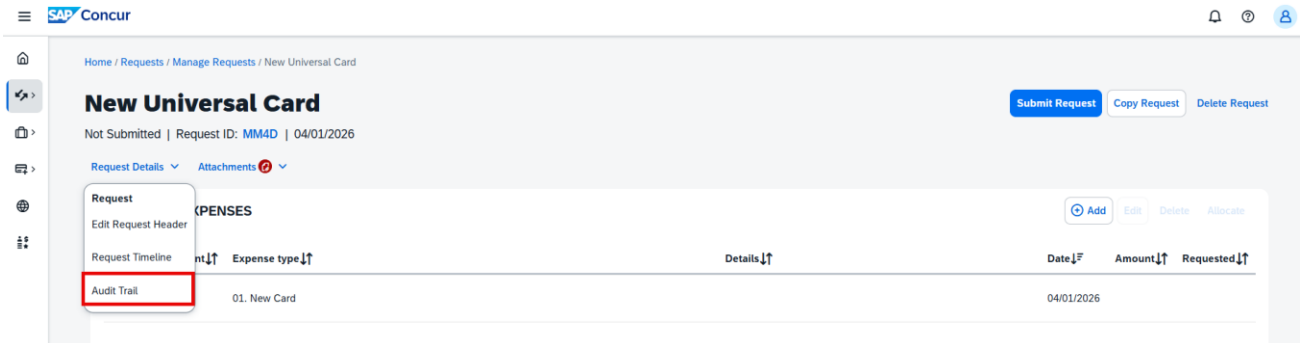
- a. The example below is for new card that is within the monthly limit per CSU Payment Card policy.



# Audit Trail

The audit trail will display the timestamp of certain actions taken on the request.


1. Select **Request Details**, then choose **Audit Trail** to view a detailed record of all actions taken on the request.



2. The date/time of the action and the description will display.

Request Level			
Date/Time↓↕	Updated By↓↑	Action↓↑	Description↓↑
03/04/2026 12:53 PM	Test Beth	Approval Status Change	Status changed from Submitted to Pending Direct Supervisor Approval Comment: Step Name:
03/04/2026 12:53 PM	Test Beth	Approval Status Change	Status changed from Not Submitted to Submitted Comment: Step Name: Request Submitted
03/04/2026 12:53 PM	Test Beth	Confirmation Agreement Acceptance	*NEW CSU-Card Services Request User Agreement

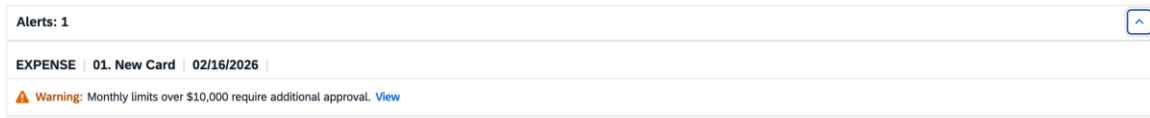
  

Expected Expense Level	
 <p><b>No Data.</b> There is no data to display.</p>	

# Alert Type

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Alerts are messages triggered by certain criteria in your Request. There are different types of alerts.



1. **ERROR:** If an alert displays in **red**, it is displaying an error. This means an action must be taken before the Request can be submitted.
2. **WARNING:** An **orange** alert displays communication related to your Request components advising you to read and take action.

**Note:** Most orange warnings will not clear; however, they will not prevent the user from submitting the Request.