GUIDE: HOW TO APPLY FOR A CARD

1. Log into Concur at https://untsystem.edu/concur
2. Navigate to Requests
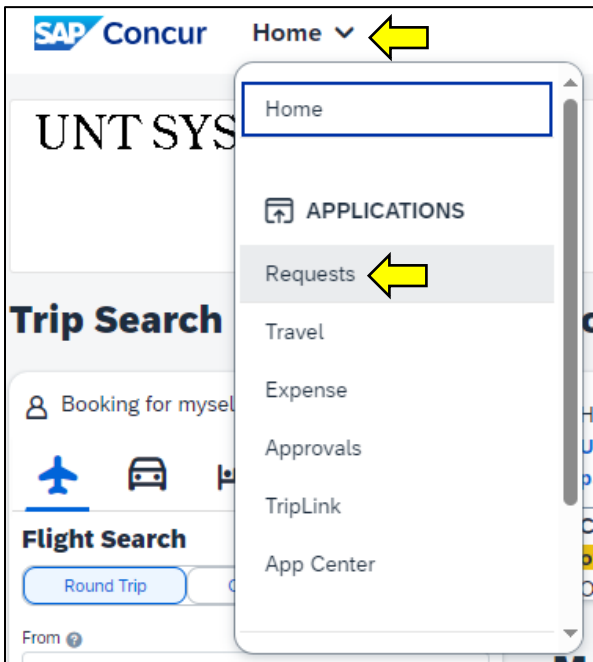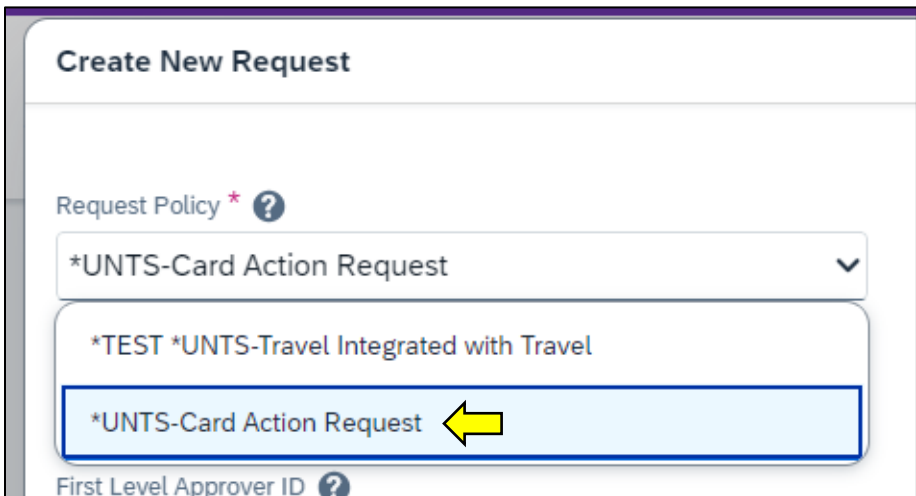

Pro Tip: Want to become familiar with navigating Concur and taking advantage of optional features? Check out our Concur Resource Page at https://finance.untsystem.edu/travel/concur-request-travel-expense.php

3. Select "Create New Request"

4. Choose Card Action Request

5. Give the Request a name and choose the type of card you are applying for. Choose either a Purchasing Card (PCard) or Travel Card.

Create New Request ✕

* Required field

Request Policy * ❓
*UNTS-Card Action Request ⌄

Card Action Request Name *
PCard for dept. supplies ⬅

Card Type *
Purchasing Card (PCard) ⌄

Card Action *
None Selected ⌄

None Selected

Purchasing Card (PCard) ⬅

Vendor Name ❓

Travel Card

Business Justification for Request * ❓   0/500

6. Choose the Card Action "New Card Only". If applying for a PCard, enter the 8 digit Empl ID of your first level PCard approver. Leave Vendor Name & Limit fields blank in new card applications. Enter the Business Justification and default chart string.

Card Type *
Purchasing Card (PCard) ⌄

Card Action *
1) New Card Only ⌄

First Level Approver ID ❓
12345678

Vendor Name ❓
❌

Limit amount/Estimated amount of purchase ❓
❌

Business Justification for Request * ❓   75/500
I'll be responsible for stocking office supplies and other items as needed.

Department *   1
Code ⌄ 123456 🔍

Project *   2
⌄

7. Enter any comments and then select Create Request

Comments To/From Approvers/Processors ❓   81/500
Use comments to communicate to approvers specific details related to the Request. ⬅

Cancel   **Create Request** ⬇

8. Attach certificate of training completion (PCard training or Travel Training, depending on card chosen). Select Save

9. Select Save to verify Alerts have been cleared and then select Submit Request.

10. Next Steps: The approval workflow after submitting is Supervisor approval > Default Chart string budget approval > Card Services Approval (PCard & Travel Teams).

Once your card application is approved by the Card Services Team, you'll receive notice of a card ready for pickup within 5-7 business days.