



Research Office General Practices/Guidance for Concur Card Holders

The information contained in this document is to provide Research Office (RO) colleagues with basic information and guidance for the use of their Concur Card. This information does not replace or modify University Policies and Procurement training/reference tools. Concur cardholders are required to ensure compliance with the University [Policy 3-07](#) and [Policy 5-22](#)).

Employees may request a card in Concur by submitting a UDCC Services Request with "New Declining Balance Card (DBC)" or "New UDCC" selected as the Request Purpose. Once the Request form is submitted, it will be routed for supervisor for approval and then to the Concur Processor queue where it will be processed by the credit card services team.

UD DBC (a white card) – issued to an employee at the University, the DBCs are intended for the infrequent traveler, employees who spend less than \$5,000.00 per year, and employees who spend sporadically. A DBC is the most appropriate choice for most UD employees.

UDCC Services Request can be submitted in Concur with "Replenish DBC" as the Request Purpose. When funding your DBC the cap is set at **\$3,500.00**. If a higher cap is required it is up to the cardholder to substantiate that need in their budget request.

Although not required Cardholders are recommended to contact **Bank of America Global Card Services at 888-449-2273** to notify them of your travel locations and dates about a week prior to departure. This reduces the possibility of your card being declined due to suspected fraud. On this call, you should also verify that your card is active and make sure that you have enough funds available to cover your expenses while travelling.

UDCC (a blue card) – a charge card issued to an employee at the University for the purpose of making authorized purchases on the University's behalf. The University will issue payment to the merchant/Card Issuer for charges made with the UDCC (UDCC). The UDCC is a traditional credit card with a monthly limit that refreshes each month.

The Cardholder is responsible for obtaining Supporting Documentation from the merchant (itemized sales receipt, packing slip, etc.) for all purchases made with the Concur Card with a value of \$25.00 or over, and for verifying that the documentation complies with the requirements for Support Documentation.

Supporting Documentation – a merchant produced or non-University document that records relevant details for each item purchased including quantities, amounts, dates, participants and a description of what was purchased, the total charge amount, and the merchant's name and address (e.g., sales receipt, original invoice, packing slip, credit receipt, etc.). In the absence of this, a University Approved Affidavit may be utilized as an exception.

Research Office team members should attach a copy of their supervisor's email approval for business travel.

Since all Research Office, employees are eligible to receive a Concur card for business travel, per diem request for reimbursement is no longer an allowable option for members of the Research Office. Please address questions to your supervisor. Meals and incidentals incurred during business travel are *limited* to the appropriate Per Diem, regardless of payment method. The employee is responsible for reimbursing the University for costs incurred on the UD Credit Card in excess of the Per Diem (based upon the aggregate duration of the trip) within 30 days.

In instances when the UDCC is not accepted, it is the responsibility of the Cardholder being reimbursed to provide complete and accurate information and documentation (including evidence of supervisor approval) in support of the business expenses submitted for reimbursement.

Verification of expenses and submission of reimbursements and settling of any cash advances, along with necessary original receipts, must be submitted no later than thirty (30) days after the ending date of the business activity. A traveler must ensure verification and approval through Concur. Refer to for additional information about the UD Credit Card policy.

Contacts and Links:

Udel.edu/concur – access to the Concur tool

[Procurement/Concur](#) – access UD Concur references and training tools

Ext. 2161 or CreditCard@udel.edu – for questions regarding your credit card during normal business hours 8:00 AM – 4:30 PM

Bank of America Global Card Services at 888-449-2273

Please refer to University Travel and Business Hosting Policy (legacy 3-07) and UD Credit Card Policy (legacy 5-22) for detailed guidance. Please also review the Concur Training Tools available on Procurement's website. You may also contact Devora Frisby, Cost Object Approver for the Research Office with questions.