Submitting P-Card Requests through SAP Concur

Effective 9/7/2021

Caltech

The P-Card Services team would like to announce the integration of a new module called *Request* within CardQuest.

In an effort to streamline and automate the current P-Card PDF process, the following P-Card requests will be transitioned to an electronic system and retired from the *Forms* page on the Procurement Services website.

As of September 7, 2021, all P-Card requests listed below must be submitted through *Request* in CardQuest.

➢ Declining Balance Card Request*

➢ Low Limit Card Request*

➢ Non-Cardholder Access Request*

➢ Request for P-Card*

➢ Change Limit Request

➢ Delegate Request**

➢ Expense Approver Update

➢ Request to Cancel/Suspend P-Card

*The Requests above marked with an * require the signed P-Card Policy Acknowledgement Attachment.*

*The Request marked with a ** may require additional provisions if the cardholder is a faculty member. Please contact PCardServices@caltech.edu for more information*

Approval Workflow

The following forms require approval from the cardholder/user's expense approver:

➢ Change Limit Request

➢ Declining Balance Request

➢ Low Limit Card Request

➢ Non-Cardholder Access Request

➢ Request for P-Card

1. Log into CardQuest

2. Request is fulfilled and submitted by end user

3. If there are no exceptions the end user will receive a CardQuest notification confirming it's been processed

4. The approver may return, approve and forward or approve request

5. If approved, the request will be routed to P-Card for final review and completion

6. The end user will receive a CardQuest notification that the request has been processed

The following requests <u>Do Not Require</u> expense approver review.

These requests will be routed directly to P-Card for review and processing:

- ➢ Expense Approver Update
- ➢ Delegate Request*
- ➢ Request to Cancel or Suspend

If there are no exceptions, end-user will receive a CardQuest notification that the request has been processed.

The *Request* marked with a ** may require additional provisions if the cardholder is a faculty member. Please contact PCardServices@caltech.edu for more information.

A few forms will remain as PDF's as they are required supporting documentation, and do not require further action from P-Card:

- ➤ CardQuest Cashier Deposit Form
- ➤ CardQuest Foreign Receipt Addendum
- ➤ P-Card Missing Receipt Form
- ➤ P-Card Policy Acknowledgement

Please reference our "Training Videos" or "How to Guides" for our new requests on our *Training* page within the Procurement Services website.

- ➢ Declining Balance Card Request
- ➢ Low Limit Card Request
- ➢ Non-Cardholder Access Request
- ➢ Request for P-Card

- ➢ Change Limit Request
- ➢ Delegate Request
- ➢ Expense Approver Update
- ➢ Request to Cancel/Suspend P-Card

THANK YOU!

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