Limit Increase Request

Scope and Purpose

This guide is intended for all TCU Procurement and/or Travel Card holders with access to Concur. This guide provides detailed instructions on how to request a temporary purchasing limit increase. Requests can be made to increase your overall card limit for the duration of the request, or to raise the single transaction limit if a high-dollar purchase is being blocked despite sufficient available balance.

Definitions

Card Limit

The overall maximum balance your corporate Travel or PCard can hold at any given time.

Transaction Limit or Single Use limit

The maximum allowable amount for a single point of sale transaction at any given time.

Process Overview

This section gives a quick overview without screenshots, if you just need a reminder of where to find the request.

Step 1: Create a Request in Concur

Access Concur using your preferred method, and create a request. Choose TCU Card Request and Updates, and select “change to existing card.”

Step 2: Add an Expense to Report

Add an expense to your report, and choose item number 4- “MCC Change or Limit Change,” and complete the applicable fields in the dialogue box that pops up. Click save once all the fields are complete.

Step 3: Submit Report

Submit the report.

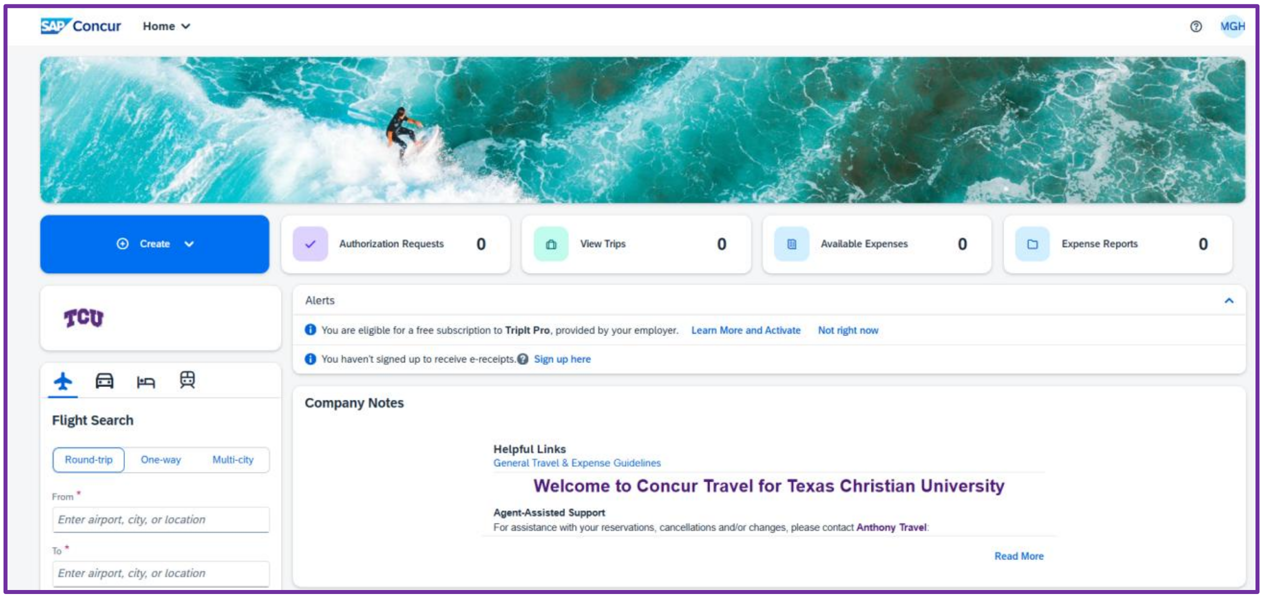
Contents

Step by Step Guide

Step 1: Access Concur

Navigate to your Concur profile through [MyTCU](), [tcu.okta.edu](), a saved web link, or links found on TCU's Procurement webpage.

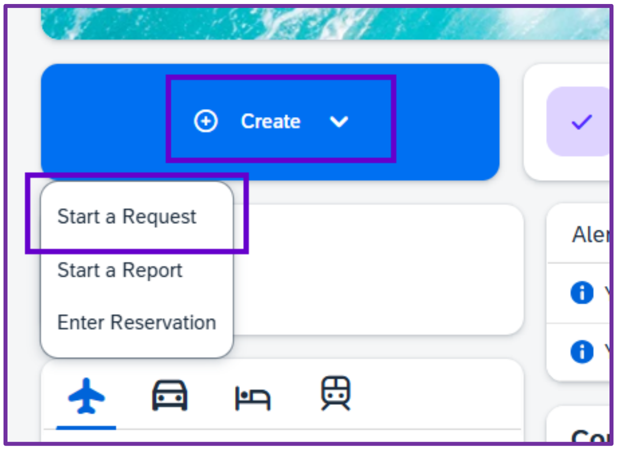
Log in with your SSO if prompted. Your home page should look something similar to this.



Step 2: Create a New Request

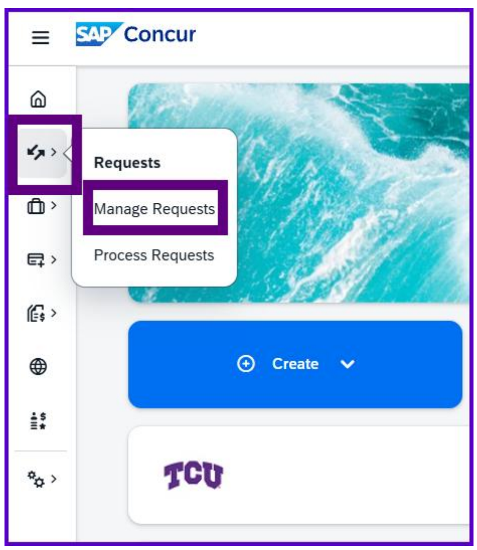
Method 1: From the Homepage

From your home page, click on the blue "create" button, and select "start a request."



Method 2: Navigate through Manage Requests

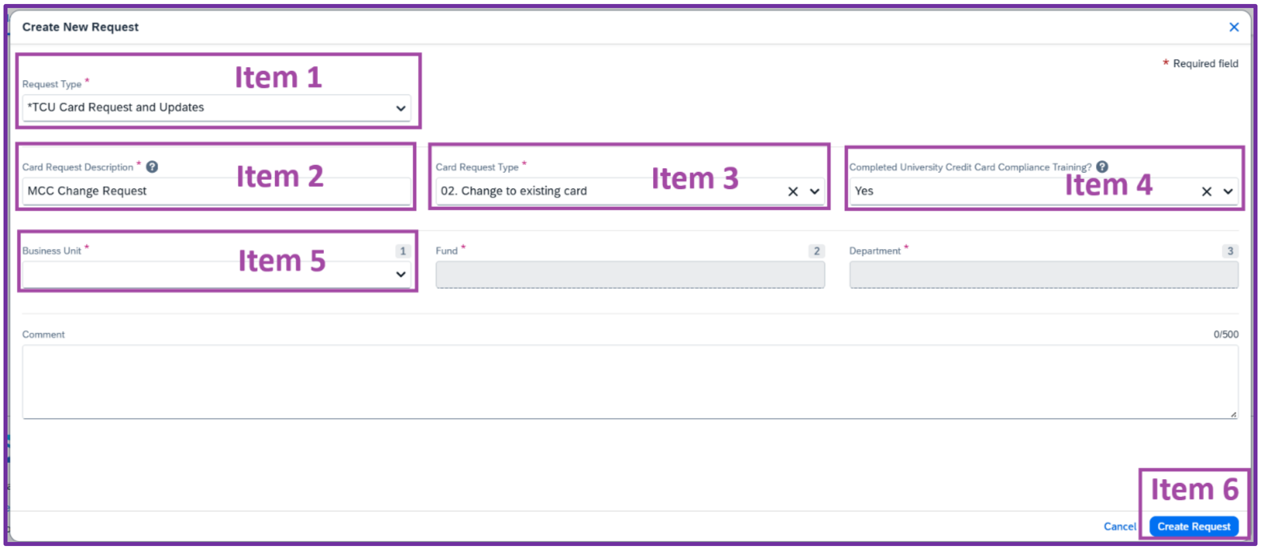
Click Authorizations Requests.



Then click on Create New Request in the upper right-hand corner.

Step 3: Fill in the New Request Details

A new dialogue box will open after you click on Create New Request.



Item 1: Request Type

Select "TCU Card Request and Updates" in the box labeled 1.

This will change all the field names and tell Concur that you are doing a request related to your card.

Item 2: Card Request Description

Enter a TITLE into this field for your request.

Common titles include "[Last Name] Limit Increase," and "Temporary Limit Increase".

Item 3: Card Request Type

Select "Change to existing card" for item number 3. This will tell Concur you want to update your current card, not request a new one or cancel your existing card.

Item 4: Training

Always select "yes" to indicate you have completed the University training.

Item 5: Unit Information

If this information is not auto-filled, complete this section according to the unit you are assigned to or making the purchase for.

Item 6: Create Request

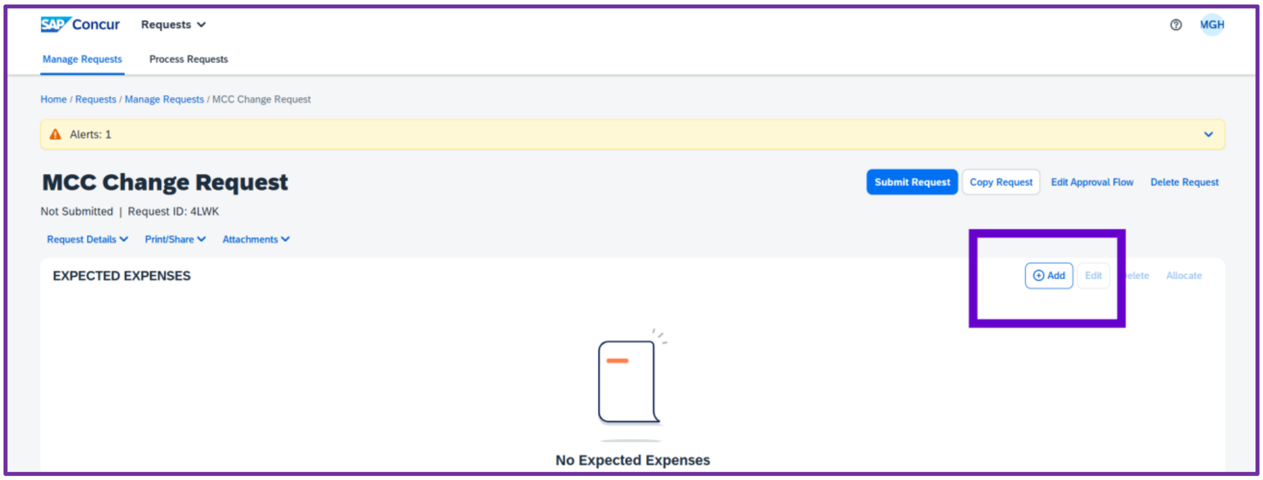
Review the information you have entered for accuracy, and then click on Create Request in the bottom right-hand corner.

Step 4: Add an Expense

You have now created a report to request a Limit Increase, but have not submitted it. The next step is to tell the report what kind of change to your card you would like to make.

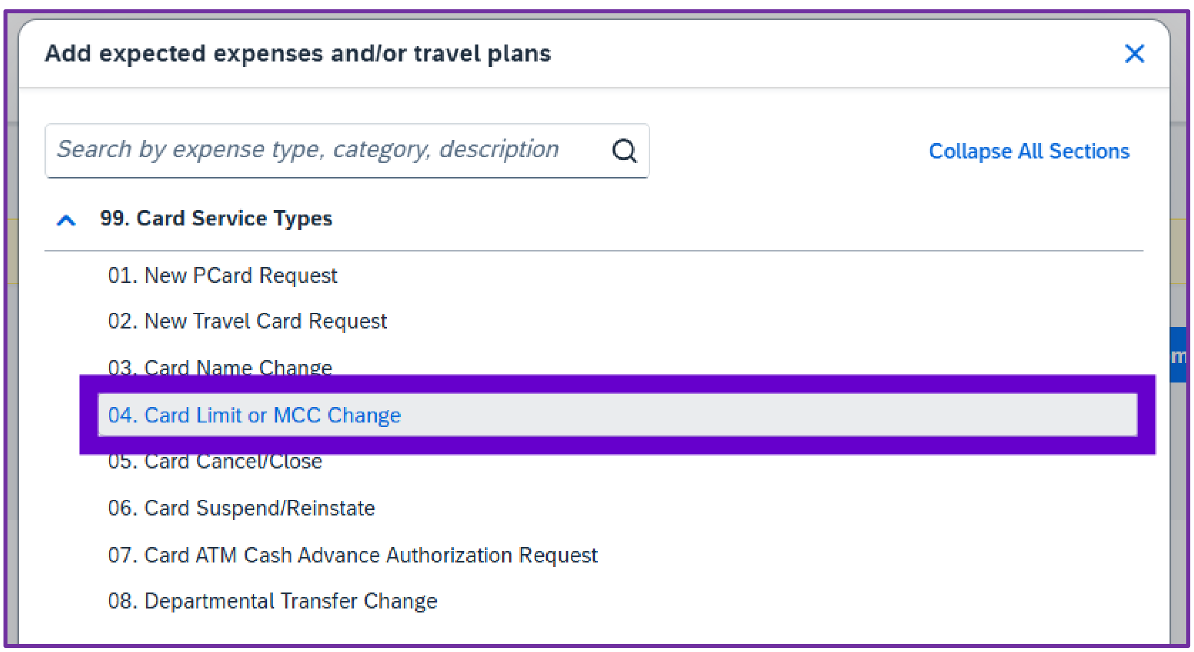
Item 1: Add an Expense

Click the +Add button in the upper right-hand corner underneath Submit Request.



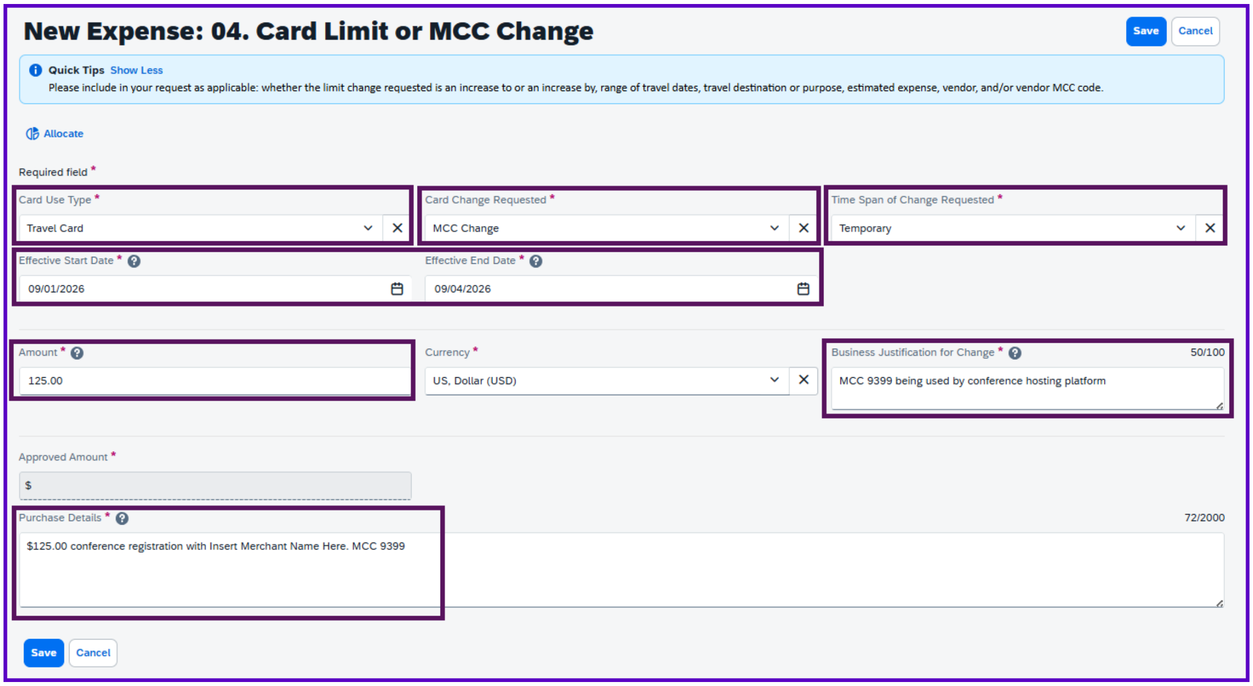
Item 2: Select Card Limit or MCC Change

In the dialogue box that opens, select item number 4: Card Limit or MCC Change.



Step 5: Fill in Limit Increase Request Information

Complete the applicable fields, and make sure to provide as much information about your purchase(s) as possible.



5a: Card Use Type

Select either Travel Card or PCard, depending on the type of card you need your MCC Change request for.

NB: If you have both a PCard and a Travel card, your selection here will be the card the MCC Change is applied to. It will NOT carry over to both cards.

5b: Card Change Requested

Select Limit Increase in this box to indicate you need one.

5c: Time Span of Change Request

This field is defaulted to temporary. Always choose temporary for this field.

Permanent requests are only in rare circumstances and require prior discussion outside of Concur. If you change this field to permanent, your request will be returned to change it to temporary.

5d: Effective Start Date

Select a date you need the change completed.

This date can be in the future.

When processed, if the need-by date has already elapsed, the request will begin on the date it is processed.

NB: Look ahead as much as possible with your purchases, and allow time for your financial approvers to process your request.

5e: Effective End Date

Enter an end date for the limit change to end.

This date should always be the end of a calendar month. You may input multiple consecutive months if you need it, but you must provide details in the box at the bottom to support the change.

5f: Amount

Enter the amount of the **total purchase(s)** in this box. If you have multiple purchases to make, put the grand total in this box, and itemize them below in “Purchase Details” along with the limit you need.

5g: Business Justification for Change

This field is designed to indicate to TCU **why you need your card reconfigured**. Most purchases, it’s simply because you are spending more than your typical limit.

However, a more detailed justification is always preferred. If you need more character space, provide more details in the box at the bottom.

5h: Purchase Details

For a single or multiple specific purchase(s):

Enter into this box the limit you need, in increments of $2500.00, and the details of the purchase(s) you are attempting to make.

- Merchant name(s)
- Specific item(s) being purchased
- Limit you need
  - ***NB: Please specify more than a number, such as the example below. If it is not clear what you are requesting, your request will be returned for more information.***

Example: "Increase PCard limit to $5000.00 for the month of August. The department is purchasing more books than usual for students starting classes."

For a travel-related request:

Enter into this box the details of your trip.

- Travel destination
- Travel dates
- General business purpose of the trip
- General statement about total expected expenses

Example: *"Traveling to Ireland for 2026 Aer Lingus bowl for donor relations, 8/24 to 8/31; Requesting limit increased to $5000.00; Hotel $2000.00, extra in case of additional donor meetings."*

Reminders and Special Considerations:

- **Single PCard Amounts over $2500.00**
  - Purchase of tangible goods over $2500.00 on a PCard must be completed in Jaggaer.
  - If this request is for an exception due to sole-source vendors, you must reach out to Concur@tcu.edu prior to your request to discuss your needs.
- **IT Purchasing:**
  - You must attach IT pre-authorization to your request.
  - Email ***itpurchasing@tcu.edu*** with questions and requests.
- **Contracts**
  - You must provide a copy of the executed contract detailing card payment.
  - Email ***contract_questions@tcu.edu*** with questions and requests.

5i: Review and Save

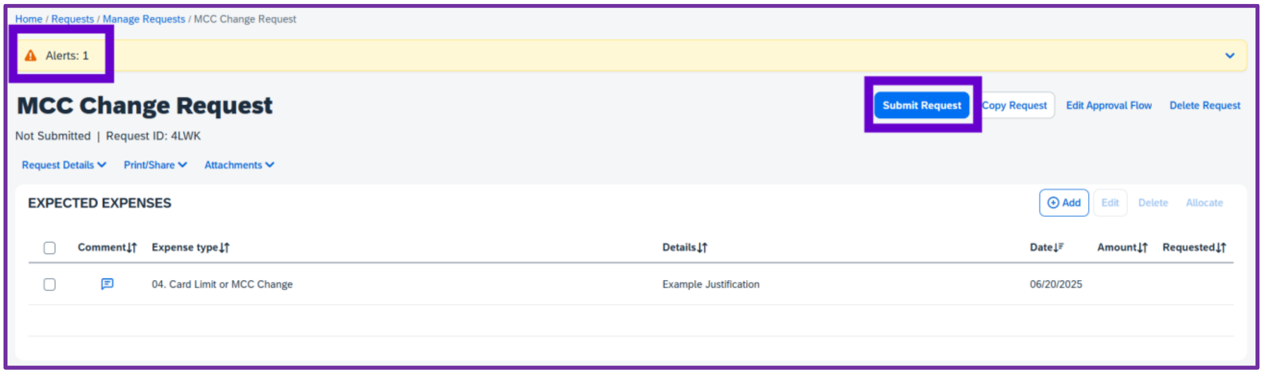
Review the information entered to ensure accuracy, and then click save at the bottom OR the top.

Step 6: Review Details and Submit

Review the details of the report to ensure accuracy.

Check for Alerts at the top and ensure there are no errors.

Click on Submit Request.



Resources

[Concur Travel & Expense Page] – Information regarding expenses and traveling

[University Card Programs] – University page including Travel and PCard Guides

[Card Compliance Training] – University training for card compliance

concur@tcu.edu – Support for Concur and purchasing cards

itpurchasing@tcu.edu – Support for software and online data platform purchases

contract_questions@tcu.edu – Support for contracts with vendors

JP Morgan Cardholder Support - 800-316-6056

International Cardholder Support 1-847-488-3748

Fraud Alert Text Messages - Sign Up Website