**Requesting a Custodian Transfer**

The following will be required when requesting a Travel Card Custodian Transfer:

1. **Obtain CDA Approval** for the transfer.
2. New Custodian (Primary Custodian/Cardholder) will need to **obtain Procurement/Travel Card Clearance**, as well as any Additional Custodians.

* Visit the link below to view or submit a request:
  1. CHRI Request: <https://uh.edu/human-resources/talent-acquisition/chri/>
     1. Procurement/Travel Card Clearance valid for up to 6 months.

1. New Custodian (Primary Custodian/Cardholder) will need to **complete T Card Cardholder training** through T.A.P., as well as any Additional Custodians.

* Visit the link below for instructions:
  1. <https://uh.edu/adminservices/PASS/trainingenrollment.htm>
     1. Completing online training annually is required.

1. New Custodian (Primary Custodian/Cardholder) will need to **have an active Concur Profile**, as well as any Additional Custodians.

* If this is for a first time Concur user, follow the instructions listed below to get started:
  1. Login to **P.A.S.S.** 🡪 Employee Self Service 🡪 **Miscellaneous** 🡪 **Concur Travel Management** 🡪 **Concur Self Service** page (for new Concur users)
  2. Fill in the information in the **Concur Self Service** page and click **Save**.

\*\*\*Note: The Concur profile will become available the next day.

**Additional Information**

**Primary Custodian/Cardholder:** Employees who have custody of the UH-issued travel card. The travel card will be assigned to the Primary Custodian in Concur. This person will be responsible for processing all travel card transactions in Concur through Concur Expense Reports.

**Additional Custodian:** Employees who serve as the backup to the Primary Custodian. Additional Custodians should be setup as a Concur Delegate to the Primary Custodian/Cardholder. This will allow Additional Custodians to have access to view the travel card transactions that appear in the Primary Custodian/Cardholder’s Concur profile.

**Concur Delegate:** Employee who is authorized to act on behalf of another user in Concur. A Concur Delegate will have access to view and create Travel Requests and Expense Reports in Concur for a specified user (depending on access granted).

\*\*\*For additional information visit: [How to Select Delegates to Prepare your Documents](https://uh.edu/office-of-finance/ap-travel/concur-travel-management-system/11-how-to-select-delegate-to-prepare.docx)