



Controller's Office – Travel Team
Creating a Travel Card Expense Report

Begin by logging into PeopleSoft Finance: <http://finance.ps.sc.edu>

Navigation: Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify > Add a New Value

To create a Travel Card Expense Report:

1. Enter the **USCID** of the **Travel Card Holder**.
2. Click **Add**.
3. Change the Business Purpose to **Travel Card** by selecting from the drop-down menu.
4. Add a **Description** – Best practice: **Month/Date/Travel Card** (i.e., January 2025 Travel Card).
5. Click on **My Wallet** to access transactions.
 - Select the transaction(s) posted to the statement by checking the box.
 - Click **Done**.
 - The transaction(s) is assigned to the expense report.
6. Review the Chartfield Information (accounting details).
 - Chartfield on each expense line.
 - Default Accounting.
 - Action – **Default Accounting for Report** (select from drop-down menu).
 - Click **Go**.
 - Review/Add Chartfield.
 - Click **Okay**.
7. Attach the **statement** and **all paid receipts**.
8. Use the correct expense type for the transaction (air travel, registration, hotel/lodging)
9. Use the correct description for the type of traveler.
 - **Employee:** USCID: Name: TA (if applicable): Date: Location: Type of Travel.
 - **Student:** TA, Student: USCID: Name: Dates: Location: Type of Travel.
 - **Non-employee:** TA: Non-Employee: Name, Dates: Location: Type of Travel.
10. Use correct account for the type of traveler.
11. Use correct location on the expense line (in state, out of state, foreign).
12. Click **Save for Later**.
 - If a red warning bubble appears on the expense line or lines, click the warning bubble to view the warning.
 - Add a **Comment**.
 - Click **Okay**.
 - Add an older transaction comment to each expense line with a warning.
 - Click **Save for Later**.

13. Click **Summary and Submit**.
14. Check the box to **certify expenses**.
15. Click **Submit Expense Report**.
16. Click **Okay** in the Expense Report Submit Confirmation popup.
17. The expense report is in the workflow for approval.

Travel Card Expense Report approval (status - paid) is due within **30 days of billing cycle end date**. Billing cycles run from the 26th through 25th of each month. Travel card expense post to budget with paid travel card expense report.

Travel Resource Links

[Travel Card Training Recording](#)

[Travel Card Descriptions](#)

[Travel Card Job Aid](#)

Questions: travelcard@sc.edu