

OFFICE OF THE CONTROLLER

General Accounting – Travel Team Employee Travel Refresher Training

February 2025





Table of Contents

Travel and Expenses	3
Policies and Procedures	11
Resources and Contacts	14



Travel and Expenses

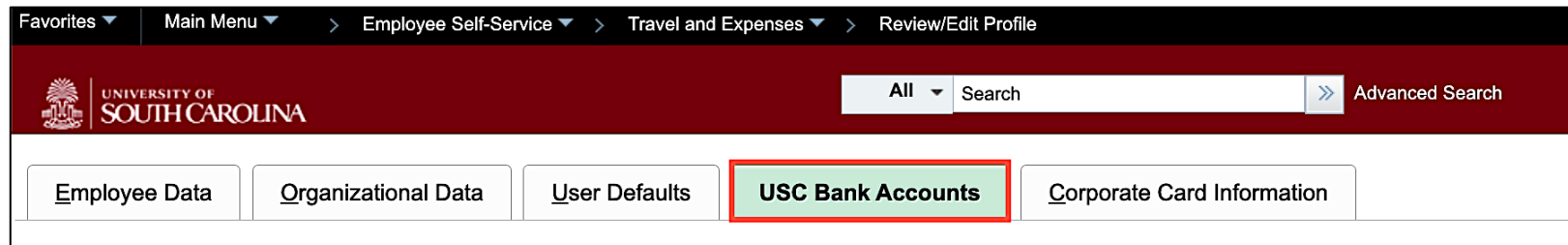


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Employee Travel

Updating bank information - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Review/Edit Profile



- First step to using the Travel and Expense module is entering bank account information.
- Entering banking information validates the traveler, allowing transactions to be completed on their behalf.
- **ALL** payments will be made via direct deposit.

Employee Travel

Travel Authorization (TA) - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Travel Authorization – Create/Modify

- Approved TAs are required for:
 - ✓ Expenses \$5,000 or greater
 - ✓ All Foreign Travel
 - ✓ All Travel Advances
 - ✓ Airline Tickets issued by University Approved Travel Agencies and charged to the TA
- Travel Authorizations must be **Future Dated** using the **business days of travel**.
- Include Destination & Date in Report Description.
- The account code for all employee travel is **55120**
- Once a TA has been associated to an expense report, it is no longer available to use again.
- An Approved TA encumbers the amount on your budget.



Foreign Employee Travel

International Travel Health Insurance

For faculty and staff on university related international travel, the University provides a blanket travel policy plan, and all employees are automatically insured. The Education Abroad Office encourages employees to log in and enroll to get copies of coverage cards before travel.

We offer this coverage because most domestic insurance policies do not provide international coverage or consider it out of network. Additionally, domestic policies do not typically provide emergency response assistance in the case of a natural disaster or political unrest, or if you need to be medically evacuated.

You can find the short online enrollment form [here](#).

If you have any questions about the insurance, please reach out to the Education Abroad Office at SAABROAD@mailbox.sc.edu.



Employee Travel

Travel Advance - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – USC Travel Advances – Create/Modify

- TA is **required** for a Travel Advance.
- A Travel Advance is for up to 70% of total estimated Lodging & Meals up to \$3,000.
- Only 1 advance can be requested & must be applied to an expense report or repaid.
- The Advance is paid 10 days prior to travel.
- The Advance will be applied to the first available expense report.
- The account code for a Travel Advance is 10206.



Employee Travel

Expense Report - PeopleSoft navigation:

Main Menu – Employee Self Service – Travel and Expenses – Expense Report – Create/Modify

- Expense Reports must be submitted after the trip. Use the actual business dates of travel.
- For meals, please use three expense lines:
 - ✓ Line 1 - 1st day of travel **include** the **time of departure**.
 - ✓ Line 2 - all days in between.
 - ✓ Line 3 - final day of travel **include** the **time of return**.
- The account code for all employee travel is 55120.
- No reimbursements to an employee prior to travel are allowed.
- All expense reports must be completed and fully approved prior to an employee's termination date.
- Payment Request – Direct payments should include USCID, Name and Destination.



Meal Allowance

Time of Departure	Time of Return	Meal	In-State	Out-of-State
Before 6:30am	After 11:00am	Breakfast	\$8.00	\$10.00
Before 11:00am	After 1:30pm	Lunch	\$10.00	\$15.00
Before 5:15pm	After 8:30pm	Dinner	\$17.00	\$25.00
All Day	All Day	All Meals	\$35.00	\$50.00

- In-State, Out-of-State, & Canada follow the above rates.
- [U.S. Department of State Foreign Per Diem Rates](#) based on country, location, & date.
- **NO MEAL REIMBURSEMENT FOR ONE DAY TRAVEL.**





Demonstration

- How to create a travel authorization?
- How to create an expense report?



Policies & Procedures



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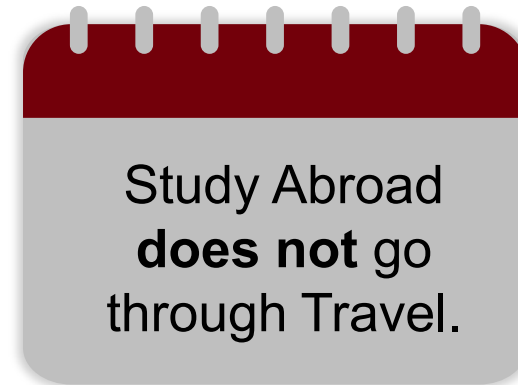
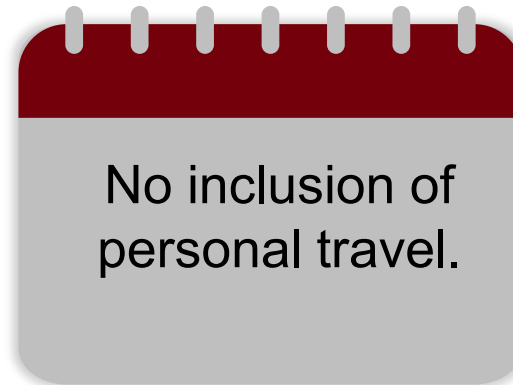
Policies and Procedures

- Airfare – Economy Class only.
- Hotels – Maximum \$429.54/night plus taxes and fees.
- Paid itemized receipts are required for lodging.
- No lodging within 50 miles of your official headquarters and/or place of residence.
- Current mileage rate is \$0.70/mile – No mileage reimbursement within 10 miles of an employee's official headquarters and/or place of residence.
- Ridesharing (Uber, Lyft) is allowed with paid receipt.



Policies and Procedures

- When claiming reimbursement for expenses that are in a foreign currency, expense reports should be completed in US dollars and the rate of exchange documented. Please use the exchange rate on the date of the transaction or amount posted to credit card statement.



- Reimbursement for travel will be made after the trip is complete and expenses should be submitted within 7 days of return from trip.



Resources & Contacts



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Office of the Controller

Office of the Controller

General Accounting

Accounts Payable

Capital Assets

Chart of Accounts

General Ledger

Moving and Relocation

Travel

Treasury Management

General Accounting Staff Directory

Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource and Training
Toolbox

Travel

Travel is responsible for the review and disbursement of funds in accordance with university policies and procedures. Our staff process travel payments and reimbursements for faculty, staff, non-employees and students.

Expense Module Correction Form

Expand all



Travel Advances



Travel Agencies



Travel Reimbursement Voucher (TRV)



Updating Banking Information



The employee is responsible for updating banking information in PeopleSoft. This will validate them in the Travel and Expense module and allow them or a Proxy to create an expense transaction on their behalf. Be sure banking information is correct and update when necessary. All Travel and Expense module payments are made via direct deposit.

[Updating Banking Information \[pdf\]](#) 

Resources



Contact Travel

For questions about any Travel services, please contact us directly:

1600 Hampton Street, 6th floor
Columbia, SC 29208

Email: teoffice@mailbox.sc.edu 

Where to Find Resources

For Updating Banking
Information Resources, visit our
[Travel](#) Page.



Office of the Controller

Office of the Controller

General Accounting

Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource and Training
Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training
Schedule

Listserve

Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Travel Reimbursement

Travel is responsible for the review and disbursement of funds for faculty, staff, non-employees, and students in accordance with university policies and procedures.

Visit the [Travel](#) page for additional Travel Information.

The below training resources are available:

• Employee Travel

- [Travel and Expense Refresher Recording](#)
- [Travel and Expense Refresher Presentation \[pdf\]](#)
- [Travel and Expense – Traveler Training Recording](#)
- [Travel and Expense – Approver Training Recording](#)
- [Creating a Travel Authorization Recording](#)
- [Creating an Expense Report by Associating a Travel Authorization Recording](#)
- [Creating an Expense Report Recording](#)
- [Approving Expense Transactions – Traveler JobAid \[pdf\]](#)
- [Approving Expense Transactions – Approver JobAid \[pdf\]](#)

Where to Find Resources

For Employee Travel
Reimbursement Resources, visit
our [Business Manager](#) page.

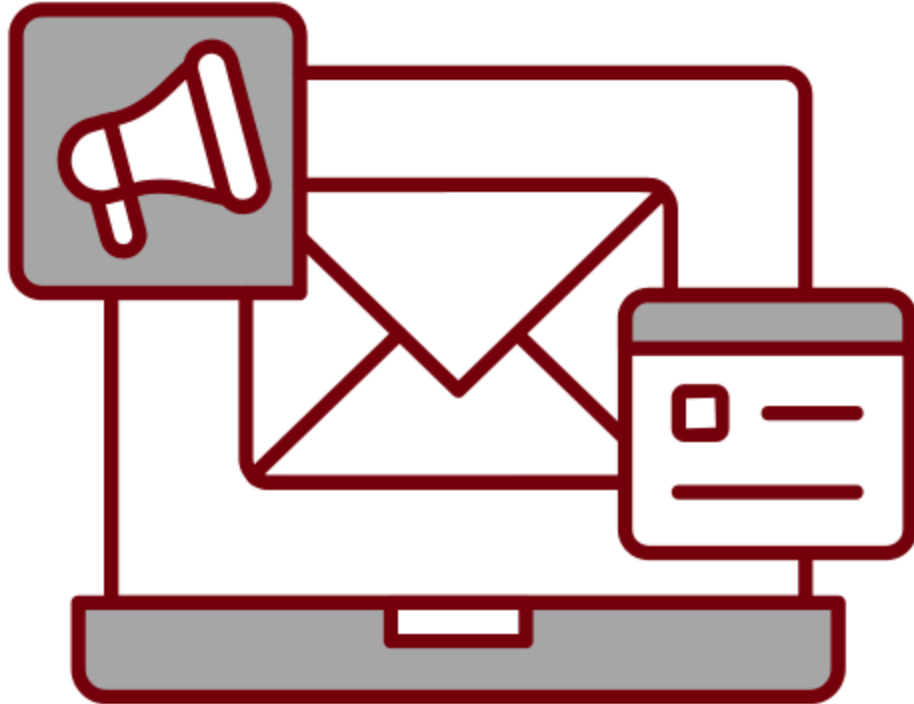


Travel Office Resources

- Contact Us:
teoffice@mailbox.sc.edu
- Controller's Office – Travel Page:
https://www.sc.edu/about/offices_and_divisions/controller/general_accounting/travel/index.php
- Travel Policy:
<https://sc.edu/policies/ppm/fina250.pdf>
- Travel Procedures:
https://sc.edu/about/offices_and_divisions/controller/documents/fina_2.50_procedure-travel.pdf



Contact Us



For specific questions, please visit our [website](#) to find the appropriate contact.



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Questions



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THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

1600 Hampton Street
Columbia, SC 29208



Contact Number:

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Fax: 803-777-9586



Email Address:

controller@sc.edu



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