

OFFICE OF THE CONTROLLER

General Accounting – Travel Team **Travel Top 10 Q and A**

November 2025





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Top 10 Travel Q and A



UNIVERSITY OF
South Carolina

#1 Travel Q and A

How can I ensure proper reimbursement of meals?

Common Mistake: Time of departure on the first day and time of return on the last day are missing.

- ✓ Always include departure and return times (AM/PM).
- ✓ Missing times are the most common reason reports are returned.
- ✓ Meals follow per diem rates (In-State/Out-of-State/Foreign).
- ✓ No meal reimbursement for one-day travel.



Meal Allowance

Per Diem Meal Allowance		
Meal	In-State	Out-of-State
Breakfast	\$8.00	\$10.00
Lunch	\$10.00	\$15.00
Dinner	\$17.00	\$25.00
All Meals	\$35.00	\$50.00

Day of Departure

Time of Departure	Meals Reimbursed
Before 6:30am	All Meals
6:30am - 11:00am	Lunch & Dinner
11:01am - 5:15pm	Dinner Only
After 5:15pm	None

Day of Return

Time of Return	Meals Reimbursed
Before 11:00am	None
11:00am – 1:30pm	Breakfast Only
1:31pm – 8:30pm	Breakfast & Lunch
After 8:30pm	All Meals

#2 Travel Q and A

What type of paid receipts should be attached to an expense report?

- ✓ Every expense needs a **paid receipt** or **proof of payment**.
- ✓ Prepaid or incomplete receipts can cause delays in reimbursement.
- ✓ Receipts must show **traveler name, dates, item details, and amount paid**. Further information may include:
 - **Lodging:** Receipt must include room rate and taxes
 - **Airfare:** Original paid airfare receipt, must include flights, class of service, ticket number
 - **Ground Transportation**
 - **Registration**
 - **Auto Rental Fuel:** number of gallons, price per gallon – not prepaid
 - **Tolls, Parking, Baggage**



#3 Travel Q and A

How do I reimburse expenses to a person other than the traveler?

Common Mistake: Incorrect documentation for reimbursing a person other than the traveler.

- ✓ Each employee must claim their travel expenses on their expense report.
- ✓ To reimburse **non-employees or students**, attach an approval to reimburse a person other than the traveler to the TRV.
- ✓ Best practice is to use a department travel card for expenses – airfare (economy) and registration – for these purchases.



#4 Travel Q and A

What are some key things to remember when creating an expense report for travel?

Employee travel is processed via a travel expense report.

Student and non-employee travel are processed via an eform TA and TRV.

- ✓ If there is an approved Travel Authorization for Travel, please associate to the expense report to liquidate the encumbrance.
- ✓ Expense report must be submitted after the travel occurs.



#5 Travel Q and A

How do I handle expenses in foreign currency?

Common Mistake: Include foreign currency amounts in the expense report.

- ✓ Enter all expenses in **USD**.
- ✓ Use a **currency conversion** based on the **actual transaction date**.
- ✓ Include both the **local receipt** and **conversion proof** (credit card statement and calculator printout).



OANDA CURRENCY CONVERTER

300 US Dollar to Euro

 **USD** US Dollar ▼

 **EUR** Euro ▼

300




257.889

USD EUR GBP BTC

EUR USD GBP ETH

Date < 30 October 2025 > 

Preview interbank rate +/- 0% ▼ 

[Hide Advanced Currency Data](#)

 [Print](#)

OANDA's currency calculator tools use OANDA Rates™, the touchstone FX rates compiled from leading market data contributors.

Using a Currency Converter

Conversions from sites like [oanda.com](https://www.oanda.com) must reflect the **transaction date's** rate.

#6 Travel Q and A con't

What actions can be taken on a Travel Authorization?

- ❖ **Create/Modify a TA:** Only a TA with a status of pending can be modified by changing dates, amounts, chart fields, adding new expense lines, and deleting expense lines.
- ❖ **View a TA:** Used to review a TA no matter the status. No adjustments can be made in View except the ability to add an attachment.
- ❖ **Delete a TA:** Only a TA with a status of pending can be deleted. Once deleted, the TA is no longer in PeopleSoft Finance. A TA that is past the travel start date and not fully approved, should be deleted.
- ❖ **Cancel a TA:** Only a TA with a status of approved can be cancelled. Cancel will liquidate the encumbrance.



eForm TA and TRVs

Navigation in PeopleSoft Finance: **Main Menu > USC Finance eForms > Student/Non-Employee Travel**

Student/Non-Employee Travel

Start a Student/Non-Employee Travel Authorization : Transaction Details Form ID 44949 (NEW)

Transaction Details

*Business Purpose Total Amount of Reimbursement \$0.00

*Default Location *Default Account

*Destination *Reason for Travel

*Date From *Date To

Notes/Comments

Recipient Information

*Full Name ↕	
1	<input type="text"/>

Expenses

Use the [Travel Authorization and Travel Reimbursement Voucher eForm Job Aid](#) for further detail on the process.

#7 Travel Q and A con't

What actions can be taken on an Expense Report?

- ❖ **Create/Modify an Expense Report:** Only an Expense Report with a status of pending can be modified by changing dates, amounts, chart fields, add new expense lines, and deleting expense lines.
- ❖ **View an Expense Report:** Used to review an Expense Report no matter the status. No adjustments can be made in View except the ability to add an attachment.
- ❖ **Delete an Expense Report:** Only an Expense Report with a status of pending can be deleted. Once deleted, the Expense Report is no longer in PeopleSoft Finance.



Expense Reports

Use the navigation: **Main Menu > Employee Self Service > Travel and Expenses > Expense Reports > Create/ Modify**

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Travel and Expenses ▾ > Expense Reports ▾ > Create/Modify Worklist Home Sign Out

UNIVERSITY OF SOUTH CAROLINA All Search >> Advanced Search Add To ▾ Notifications NavBar

Related Content ▾ | New Window | Help | Personalize Page

Save for Later | Summary and Submit

Melinda Craft ⓘ

By:

*Business Purpose

*Report Description

Reference

Default Location

*Trip Location

*Date From *Date To

Attachments Notes

Quick Start GO

Expenses ⓘ

Total 0.00 USD

Expand All | Collapse All Add: | Quick-Fill

*Date	*Expense Type	Description	*Payment Type	*Amount	*Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	USD

254 characters remaining

Expand All | Collapse All

Total 0.00 USD

#8 Travel Q and A

What does the status mean?

Please use the View pages to see the status of a Travel Authorization or Expense Report. The different status options are:

- ❖ **Pending:** Modify TA or Expense Report
- ❖ **Submitted for Approval:** Pending the approval of the traveler/employee.
- ❖ **Approvals in Process:** Pending approval at either Level 1, Level 2, or Travel.
- ❖ **Approved:** All approvals are complete. The funds are encumbered. The approved TA should be associated to the expense report after travel is complete.
- ❖ **Paid:** Expense Report is through approvals and the reimbursement is paid to the traveler.



#9 Travel Q and A

What queries can I use to review/track Travel Authorizations and Expense Reports in PeopleSoft Finance?

Common Mistake: Unsure of the status of outstanding Travel Authorizations and Expense Reports.

- ✓ Please use the query SC_EX_TAUTH_USER_INQUIRY_PRMP to review/track Travel Authorizations.
- ✓ Use any of the available search criteria to return Travel Authorization information. We recommend searching by:
 - ✓ Accounting To and From date
 - ✓ Default Location – In State, Out of State, Foreign
 - ✓ TA Status



Peoplesoft Query Viewer: Using Favorites

Navigation in PeopleSoft Finance: **Main Menu > Reporting Tools > Query > Query Viewer**

Enter the query name in the Query Name field. Once you find a query you like, save it as a favorite! Saving it as favorite will make it easy to find and use in the future.

The screenshot shows the PeopleSoft Query Viewer interface. At the top, there is a navigation breadcrumb: Favorites > Main Menu > Reporting Tools > Query > Query Viewer. Below this is a search bar with a dropdown menu set to 'All' and a search input field containing 'SC_EX_TAUTH_USER_INQUIRY_PRMPT'. To the right of the search bar are links for 'Advanced Search' and 'Last Search Results'. The main content area is titled 'Query Viewer' and contains a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there is a search filter section with '*Search By' set to 'Query Name' and a dropdown menu set to 'begins with'. The search input field contains 'SC_EX_TAUTH_USER_INQUIRY_PRMPT'. There is a green 'Search' button and a blue link for 'Advanced Search'. Below the search section is the 'Search Results' section, which has a '*Folder View' dropdown menu set to '-- All Folders --'. The 'Query' section displays a table of search results. The table has columns for Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Run to XML, Schedule, Definitional References, and Add to Favorites. The first row shows the query 'SC_EX_TAUTH_USER_INQUIRY_PRMPT' with a description of 'TAUTH User Inquiry w/Prompts', owned by 'Public' in the 'TRAVEL EXPENSE' folder. The 'Add to Favorites' column for this query has a 'Favorite' link highlighted with a red box.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
SC_EX_TAUTH_USER_INQUIRY_PRMPT	TAUTH User Inquiry w/Prompts	Public	TRAVEL EXPENSE	HTML	Excel	XML	Schedule	Lookup References	Favorite

Travel Authorization Query: SC_EX_TAUTH_USER_INQUIRY_PRMPT

SC_EX_TAUTH_USER_INQUIRY_PRMPT - TAUTH User Inquiry w/Prompts

Travel Auth ID

EMPLOYEE ID

Date Created

Submitted By

From Date

To Date

Oper Unit

Dept

Fund

Account

Class

PC Bus Unit

Project

Activity

From Acctg Date

To Acctg Date

Travel Advance ID

Expense Report ID

Default Location

TA Status

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (15 kb)

View All

Row	Travel Auth ID	Travel Auth Descr	Empl ID	Name	Traveler's Email ID	From	To	Expense Type	Location	Created On	Submitted By	Submitted By	Submitted By Email ID	Line	Dist Line	GL Unit	Oper Unit	Department	Fund	Account Class	PC Bus Unit	Project	Activity	Tran Amt	GL Distrib Status	Acctg Date	B	S
-----	----------------	-------------------	---------	------	---------------------	------	----	--------------	----------	------------	--------------	--------------	-----------------------	------	-----------	---------	-----------	------------	------	---------------	-------------	---------	----------	----------	-------------------	------------	---	---



Travel Authorization Query Results: SC_EX_TAUTH_USER_INQUIRY_PRMP

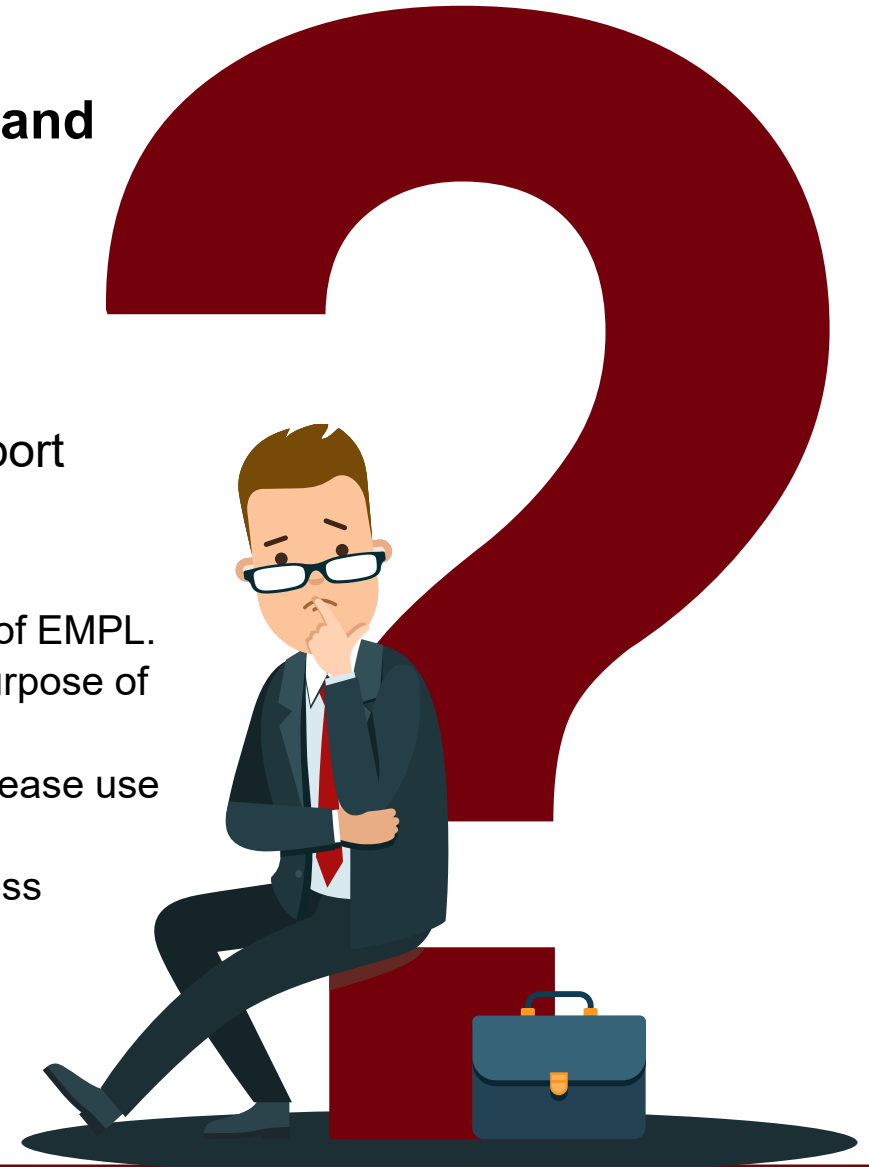
Row	Travel Auth ID	Travel Auth Descr	Empl ID	Name	Traveler's Email ID	From	To	Expense Type	Location	Created On	Submitted By	Submitted By	Submitted By Email ID	Line	Dist Line	GL Unit	Oper Unit	Department	Fund	Account	Class	PC Bus Unit	Project	Activity	Tran Amt	GL Distrib Status	Acctg Date	Budget Status	Exp Rpt ID	Adv ID	Default Loc	TA Status
1	1000029580	Oct Speaking Engagements - SC		Donaldson,Bobby J.	DONALDBJ@mailbox.sc.edu	10/24/2023	10/25/2023	Mileage	INSTA	10/19/2023	ASHFORDB	Brianna Ashford-Carroll	ASHFORDB@mailbox.sc.edu	1	1	USC01	CL002	610100	A0001	52024	301				42.580	N	10/19/2023	V			INSTA	PND
2	1000029580	Oct Speaking Engagements - SC		Donaldson,Bobby J.	DONALDBJ@mailbox.sc.edu	10/24/2023	10/25/2023	Mileage	INSTA	10/19/2023	ASHFORDB	Brianna Ashford-Carroll	ASHFORDB@mailbox.sc.edu	2	1	USC01	CL002	610100	A0001	52024	301				52.400	N	10/19/2023	V			INSTA	PND
3	1000029580	Oct Speaking Engagements - SC		Donaldson,Bobby J.	DONALDBJ@mailbox.sc.edu	10/24/2023	10/25/2023	Mileage	INSTA	10/19/2023	ASHFORDB	Brianna Ashford-Carroll	ASHFORDB@mailbox.sc.edu	3	1	USC01	CL002	610100	A0001	52024	301				78.600	N	10/19/2023	V			INSTA	PND
4	1000029580	Oct Speaking Engagements - SC		Donaldson,Bobby J.	DONALDBJ@mailbox.sc.edu	10/24/2023	10/25/2023	Meal Expenses	INSTA	10/19/2023	ASHFORDB	Brianna Ashford-Carroll	ASHFORDB@mailbox.sc.edu	4	1	USC01	CL002	610100	A0001	52024	301				27.000	N	10/19/2023	V			INSTA	PND
5	1000029580	Oct Speaking Engagements - SC		Donaldson,Bobby J.	DONALDBJ@mailbox.sc.edu	10/24/2023	10/25/2023	Meal Expenses	INSTA	10/19/2023	ASHFORDB	Brianna Ashford-Carroll	ASHFORDB@mailbox.sc.edu	5	1	USC01	CL002	610100	A0001	52024	301				18.000	N	10/19/2023	V			INSTA	PND
6	1000029592	November miles		Fox,Lillie	LILLIEF@mailbox.sc.edu	11/01/2023	11/30/2023	Mileage	INSTA	10/20/2023				1	1	USC01	CL034	115016	G1000	52024	301	USCSP	10012658	1	589.500	N	10/20/2023	V			INSTA	PND
7	1000029617	SCACPA Conference for		Zhang,Min	minzhang@greenvillemed.sc.edu	11/15/2023	11/17/2023	Hotel and Lodging	INSTA	10/23/2023				1	1	USC01	MG000	167862	A0001	52024	602				450.000	N	10/23/2023	N			INSTA	PND
8	1000029617	SCACPA Conference for		Zhang,Min	minzhang@greenvillemed.sc.edu	11/15/2023	11/17/2023	Mileage	INSTA	10/23/2023				2	1	USC01	MG000	167862	A0001	52024	602				138.860	N	10/23/2023	N			INSTA	PND
9	1000029617	SCACPA Conference for		Zhang,Min	minzhang@greenvillemed.sc.edu	11/15/2023	11/17/2023	Meal Expenses	INSTA	10/23/2023				3	1	USC01	MG000	167862	A0001	52024	602				70.000	N	10/23/2023	N			INSTA	PND
10	1000029617	SCACPA Conference for		Zhang,Min	minzhang@greenvillemed.sc.edu	11/15/2023	11/17/2023	Miscellaneous Travel Expenses	INSTA	10/23/2023				4	1	USC01	MG000	167862	A0001	52024	602				50.000	N	10/23/2023	N			INSTA	PND
11	1000029620	October TA		Blanco,Carmen	BLANCOC@mailbox.sc.edu	10/25/2023	10/25/2023	Mileage	INSTA	10/23/2023	DJINDAL	Dakshu Jindal	DJINDAL@mailbox.sc.edu	1	1	USC01	CL034	115016	K1000	52024	301	USCSP	10011268	1	150.650	N	10/23/2023	V			INSTA	PND
12	1000029669	Travel to Goveno's school		Clark,Lauren L	CLARKLL@mailbox.sc.edu	10/26/2023	10/26/2023	Mileage	INSTA	10/25/2023	CAGLEW	Whitney Cagle	CAGLEW@mailbox.sc.edu	1	1	USC01	CL049	220000	E1100	52024	201				131.000	N	10/25/2023	V			INSTA	PND
13	1000029693	October office visits		Ambrosio,Kelssy	KELSSY@mailbox.sc.edu	10/30/2023	10/31/2023	Miscellaneous Travel Expenses	INSTA	10/26/2023	DJINDAL	Dakshu Jindal	DJINDAL@mailbox.sc.edu	1	1	USC01	CL034	115011	F1000	52024	301	USCSP	10012851	1	200.000	N	10/26/2023	V			INSTA	PND
14	1000029762	TV Interview WBTW		Derienzo,Christina Lynn	DERIENZO@mailbox.sc.edu	10/30/2023	10/30/2023	Mileage	INSTA	10/30/2023	DERIENZO	Christina Derienzo	DERIENZO@mailbox.sc.edu	1	1	USC01	CL032	111400	A0001	52024	301				209.600	N	10/30/2023	W			INSTA	PND



#9 Travel Q and A con't

What queries can I use to review/track Travel Authorizations and Expense Reports in PeopleSoft Finance?

- ✓ Please use the query SC_EX_RPT_USER_INQUIRY_PMPTS to review/track Expense Reports.
- Use any of the available search criteria to return Expense report information. We recommend searching by:
 - ✓ Business Purpose:
 - If you want to review travel, please use the business purpose of EMPL.
 - If you want to review a travel card, please use the business purpose of TRAVC.
 - If you want to review employee reimbursement (non-travel), please use the business purpose of REIMB.
 - If you want to review procurement card, please use the business purpose, PCARD.
 - ✓ Accounting To and From date
 - ✓ Default Location – In State, Out of State, Foreign
 - ✓ Expense Report Status



Expense Report Query: SC_EX_RPT_USER_INQUIRY_PMPTS

SC_EX_RPT_USER_INQUIRY_PMPTS - Exp Rpts User Inquiry Prompts

Report ID

Employee ID

Submitted By OPRID

Oper Unit

Dept ID

Account

Fund Code

Class Code

PC Bus Unit

Project

Activity

Status

Travel Auth ID

From Acctg Date

To Acctg Date

Business Purpose

SetID

Default Location

View Results

Row	Business Purpose	Expense Report	Report Description	Empl ID	EMPL Name	Traveler's Email ID	From Date	To Date	Trip Location	Location	Created On	Submitted By	Submitted By Name	Submitted By Email ID	Line Number	Dist Line	Expense Type	Merchant	Ticket Number	Distance	Line Description	Expense Line Amt	GL Unit	Oper Unit	Department	Fund Code	Account	Class Code	PC Bus Unit	Project	Activity	Report Status	Travel Auth ID	Advance ID	Advance Amt Applied	GL Distribution Status	Acctg Date	Budget Status
-----	------------------	----------------	--------------------	---------	-----------	---------------------	-----------	---------	---------------	----------	------------	--------------	-------------------	-----------------------	-------------	-----------	--------------	----------	---------------	----------	------------------	------------------	---------	-----------	------------	-----------	---------	------------	-------------	---------	----------	---------------	----------------	------------	---------------------	------------------------	------------	---------------



Expense Report Query Results: SC_EX_RPT_USER_INQUIRY_PMPTS

Row	Business Purpose	Expense Report	Report Description	Empl ID	EMPL Name	Traveler's Email ID	From Date	To Date	Trip Location	Location	Created On	Submitted By	Submitted By Name	Submitted By Email ID	Line Number	Dist Line	Expense Type	Merchant	Ticket Number	Distance	Line Description	Expense Line Amt	GL Unit	Oper Unit	Department	Fund Code	Account	Class Code	PC Bus Unit	Project	Activity
1	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	1	1	Air Travel Expenses		0012412029345	0.00	4/5-9/2022: American Airlines: From CLT to MSY	395.690	USC01	CL043	158062	A0001	52024	503			
2	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	2	1	Ground Transportation			0.00	4/5/2022: Uber: From Airport to Hotel	41.950	USC01	CL043	158062	A0001	52024	503			
3	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	3	1	Hotel and Lodging			0.00	4/5-9/2022: Sheraton New Orleans	1248.400	USC01	CL043	158062	A0001	52024	503			
4	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	4	1	Mileage			196.00	Departed 4/5/2022 from Columbia, SC to CLT: Returned 4/9/2022 from CLT to Columbia, SC	114.660	USC01	CL043	158062	A0001	52024	503			
5	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	5	1	Miscellaneous Travel Expenses			0.00	4/4/2022 & 4/8/2022: Checked Bags at Airports	60.000	USC01	CL043	158062	A0001	52024	503			
6	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	6	1	Ground Transportation			0.00	4/9/2022: Lyft: From Hotel to Airport	38.910	USC01	CL043	158062	A0001	52024	503			
7	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	7	1	Miscellaneous Travel Expenses			0.00	4/5-9/2022: CLT Airport Parking	48.000	USC01	CL043	158062	A0001	52024	503			
8	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	8	1	Meal Expenses			0.00	Per Diem: Departed 4/5/2022 at 10:00 AM: Returned 4/9/2022 at 1:00 PM	198.000	USC01	CL043	158062	A0001	52024	503			
9	EMPL	3000108656	Travel for Annual NALP Conf		Crane,Elizabeth Collins	ECCCRANE@mailbox.sc.edu	04/04/2022	04/09/2022	New Orleans, LA	OUTST	04/15/2022	KFINCH	Kaitlyn Finch	KFINCH@mailbox.sc.edu	9	1	Miscellaneous Travel Expenses			0.00	4/6/2022: Telephone/Internet for Sheraton New Orleans Hotel	42.520	USC01	CL043	158062	A0001	52024	503			
10	EMPL	3000113711	Human Anatomy Conference		Gonzalez,Jessica Terry	HOLLANJT@mailbox.sc.edu	05/24/2022	05/30/2022	Ft. Lauderdale, FL	OUTST	06/06/2022	JLH41	Jennifer Houston	JLH41@mailbox.sc.edu	1	1	Hotel and Lodging			0.00	Hotel for 3 nights	269.500	USC01	SM000	964400	A0001	52024	101			
11	EMPL	3000113711	Human Anatomy Conference		Gonzalez,Jessica Terry	HOLLANJT@mailbox.sc.edu	05/24/2022	05/30/2022	Ft. Lauderdale, FL	OUTST	06/06/2022	JLH41	Jennifer Houston	JLH41@mailbox.sc.edu	1	2	Hotel and Lodging			0.00	Hotel for 3 nights	269.510	USC01	SM000	966800	L1100	52024	202			
12	EMPL	3000113711	Human Anatomy Conference		Gonzalez,Jessica Terry	HOLLANJT@mailbox.sc.edu	05/24/2022	05/30/2022	Ft. Lauderdale, FL	OUTST	06/06/2022	JLH41	Jennifer Houston	JLH41@mailbox.sc.edu	2	1	Registration			0.00	Registration fee	150.000	USC01	SM000	964400	A0001	52024	101			
13	EMPL	3000113711	Human Anatomy Conference		Gonzalez,Jessica Terry	HOLLANJT@mailbox.sc.edu	05/24/2022	05/30/2022	Ft. Lauderdale, FL	OUTST	06/06/2022	JLH41	Jennifer Houston	JLH41@mailbox.sc.edu	2	2	Registration			0.00	Registration fee	150.000	USC01	SM000	966800	L1100	52024	202			
14	EMPL	3000113711	Human Anatomy Conference		Gonzalez,Jessica Terry	HOLLANJT@mailbox.sc.edu	05/24/2022	05/30/2022	Ft. Lauderdale, FL	OUTST	06/06/2022	JLH41	Jennifer Houston	JLH41@mailbox.sc.edu	3	1	Miscellaneous Travel Expenses			0.00	Parking (On Hotel Receipt)	41.200	USC01	SM000	964400	A0001	52024	101			



#10 Travel Q and A

Why can't I find the employee that needs to be reimbursed for travel expenses in PeopleSoft Finance ?

Common Mistake: The employee has not entered banking information on the Review/Edit Profile page in PeopleSoft Finance.

- ✓ 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.
- ✓ Once saved, the employee is valid for expenses and transactions can be processed on their behalf.
- ✓ If the employee has entered their banking information and still can't be located, please check to see if the default profile box is checked on their PeopleSoft Finance profile. If it's not checked, please contact Travel, teoffice@mailbox.sc.edu, for assistance.



Updating Banking Information in PeopleSoft Finance

The screenshot displays the PeopleSoft Finance interface for updating banking information. The navigation path is: **Main Menu > Employee Self-Service > Travel and Expenses > Review/Edit Profile**. The **USC Bank Accounts** tab is selected and highlighted with a red box. In the **Organizational Data** section, the **Default Profile** checkbox is checked and highlighted with a red box. Below this, the **Bank Account Info** section is highlighted with a red box and contains the following fields:

- Bank Info Instructions
- Country: USA (United States)
- Bank Name
- Branch Name
- Bank ID Qualifier
- Digital Routing Number
- Branch ID
- Bank Account Number
- DFI Qualifier
- IBAN Digit
- MGTODD@mailbox.sc.edu (Update Email)
- Account Type
- Show/Edit Bank Account Number (checked)
- DFI ID

At the bottom of the page, there are **Save** and **Return to Search** buttons.

Navigation in PeopleSoft Finance: **Main Menu > Employee Self-Service > Travel and Expenses > Review/Edit Profile > USC Bank Accounts Tab**

- ❖ All Travel and Expense module payments are made via direct deposit.
- ❖ The default profile box must be checked on the employee's Profile page.

Questions



UNIVERSITY OF
South Carolina

Resources & Contacts



UNIVERSITY OF
South Carolina

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 Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Contact Us

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



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 Referenced in this Presentation



Office of the Controller

Office of the Controller

General Accounting

 Grants and Funds
 Management

 Compliance and Tax
 Management

Payroll Department

 Operational Management
 and Reporting

 External Financial Reporting
 and Transparency

 Resource and Training
 Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

 PeopleSoft Finance Training
 Schedule

Listservs

Social Media

Contact Us

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:

• Most Commonly asked Travel Questions

- [Travel Top 10 Q and A Recording](#)
- [Travel Top 10 Q and A Presentation \[pdf\]](#)

• 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 \[pdf\]](#)

• Student and Non-employee Travel

- [Travel Authorization and Travel Reimbursement Voucher eForm Training Recording](#)
- [Travel Authorization and Travel Reimbursement Voucher eForm Training Presentation \[pdf\]](#)
- [Travel Authorization and Travel Reimbursement Voucher eForm Job Aid \[pdf\]](#)

Where to Find Resources

For TA/TRV training resources, visit our [Business Manager](#) page.



Travel Office Resources

Overall Resources

- [Travel Policy](#)
- [Travel Procedures](#)
- [Meal Matrix One Page Reference](#)
- [Travel Checklist](#)
- [Travel Quick Reference Guide](#)
- [Insurance for Business Travel Abroad](#)

Travel and Expense Reports

- [Travel and Expense Quick Reference Guide](#)
- [Finding a Pending Expense Report for Travel](#)
- [Approving Expense Transactions – Traveler JobAid](#)
- [Approving Expense Transactions – Approver JobAid](#)

Travel Card

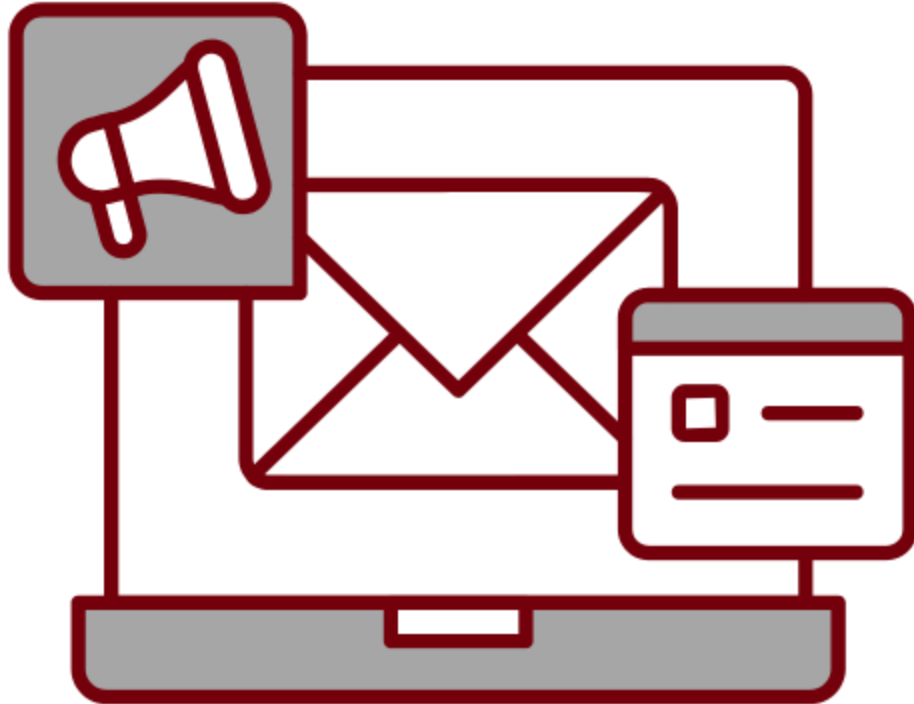
- [Travel Card Descriptions One Page Reference](#)
- [Travel Card Program Webinar Recording](#)
- [Travel Card Program Presentation](#)
- [Travel Card Job Aid](#)
- [Finding a Pending Travel Card Expense Report](#)
- [Creating Travel Card Expense Reports](#)

TA/TRVs

- [TA and TRV Voucher eForm Job Aid](#)
- [Find a Saved TRV Quick Reference](#)
- [Finding a Recycled TRV Quick Reference](#)
- [Create a TRV Quick Reference](#)



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:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



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