

How to create a Travel Expense Report in PeopleSoft

Department of Chemistry and Biochemistry (10/07/24)

- **Travel Expense Reports** are TRVs for faculty, staff, and post-docs.

Students and seminar speakers will be processed by the Assistant to the Chair.

- Travel Expense Reports have to be submitted in **PeopleSoft**

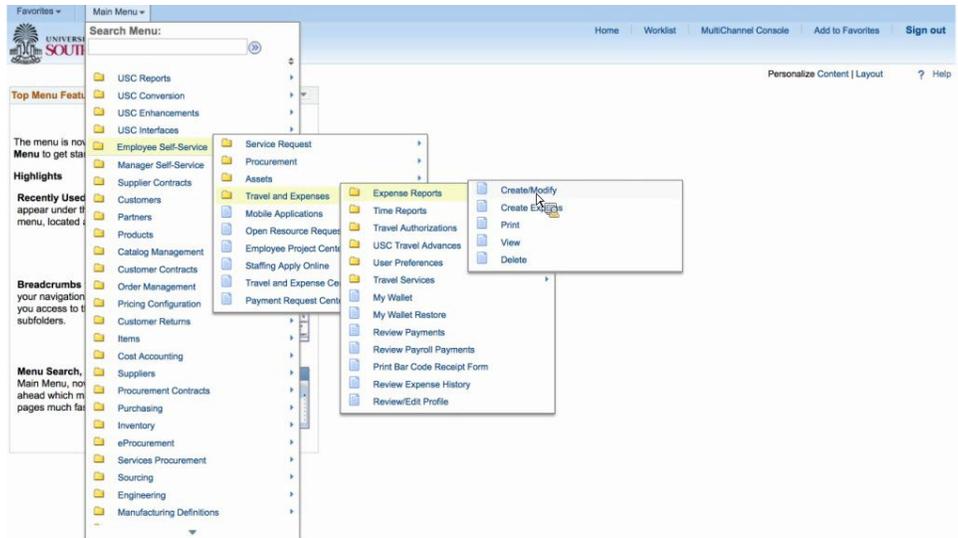
- Electronic copies of your receipts are required

either as scanned PDF copies or electronic copies of emails

- **To ensure that you receive reimbursement for your travel, the Expense report needs to be filed within 7 days of the end of your trip.**
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INSTRUCTIONS

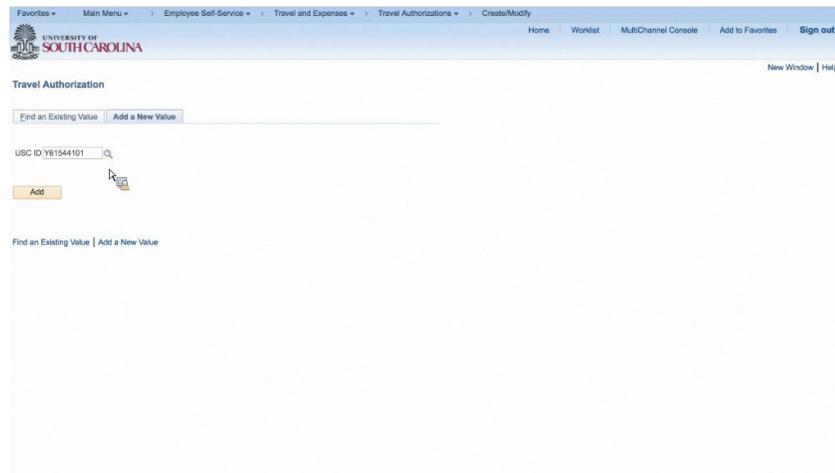
1. Items that you need to file your Expense Report:
 - a. PeopleSoft TA number (should start with a number 1). A TA must be submitted and fully approved prior to the start of travel. If an approved TA is not on file, you must attach a memo to the expense report explaining why.
 - b. Electronic copies of your receipts
These can be in one file or in separate files
2. **Login to PeopleSoft (finance.ps.sc.edu)**
3. Navigate to **Main Menu (on top bar) → Employee Self-Service → Travel and Expenses → Expense Reports → Create/Modify**



4. Enter your USC ID:

In most cases, this field should already be populated. Check to see that it is your USC ID. Your USC ID should start with a letter followed by eight numbers.

You can look up your USC ID by clicking on the magnifying glass.



5. If the search does not find your USC ID, make sure you have completed filling in your banking information (**Main Menu (on top bar) → Employee Self-Service → Travel and Expenses → Review/Edit Profile → USC Bank Accounts**)

6. Link the TA to your Expense Report:

- a. Navigate to: Quick Start (upper right and corner) and pull-down menu and select: A Travel Authorization and click Go.

- a. Select the TA you want to link from your list of approved TAs.

7. Updating the information and attaching receipts to the expense items:

- a. **Enter all amounts in US dollars. Do NOT use the PeopleSoft conversion tool.** You should do foreign exchange calculations separately outside of PeopleSoft and enter all amounts in US dollars. Use ([Currency Converter](#) | [Foreign Exchange Rates](#) | [OANDA](#)) to make the conversions to USD. For per diem rates for meals, use [U.S. Department of State | Home Page](#).
- b. Update the following fields for each expense:
 - i. Description
 - ii. Amount: Actual amounts (in US dollars)
 - iii. Expense type
 - iv. Chart field information
 - v. For meals reimbursements, there should be at least three meals expense lines:
 1. Departure to event (include departure times in the description)
 2. Days at event (include range of dates in description)
 3. Return date from event (include return time to USC)
- c. Attach receipts (these can be in one large PDF document with all of the receipts or single receipts can be attached to each line where the paper clip icon is located.)

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Create Expense Report

LLOYD TABOR ? Save for Later Summary and Submit

*Business Purpose: Employee Travel
 *Report Description: AICPA Conf. HK 10/31
 Reference:

Default Location: Foreign
 Authorization ID: 1000000016
 Attachments (1)

Actions: ...Choose an Action GO

Expenses ?
 Expand All | Collapse All Add: | My Wallet (0) | Quick-Fill

Total: 2,883.42 USD

*Date: 10/31/2017
 *Expense Type: Air Travel Expenses
 *Description: Return trip from CAE to Hong Kong
 *Payment Type: Personal Reimbursemer
 *Amount: 1,265.00
 *Currency: USD

*Billing Type: AVAILABL
 *Location: Foreign
 *Ticket Number: DELTA1234

*Exchange Rate: 1.00000000
 Default Rate
 Non-Reimbursable
 No Receipt

Accounting Details ?

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit
1265.00	USC01	1265.00	USD	1.00000000	CL071	211070	E2452	52024	202	

8. Lastly, click save and submit for the approval process to begin once all receipts and expenses have been added to the report.

9. Note: To search your funding information, click **Menu (on top bar) → Employee Self-Service → USC Conversion → USC Chartfield Mapping → USC CoA Combos Inquiry**

