How to Create a Travel Expense Report in PeopleSoft

Department of Chemistry and Biochemistry (6/18/19)

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

  Students and seminar speakers will continue to use the old travel system.

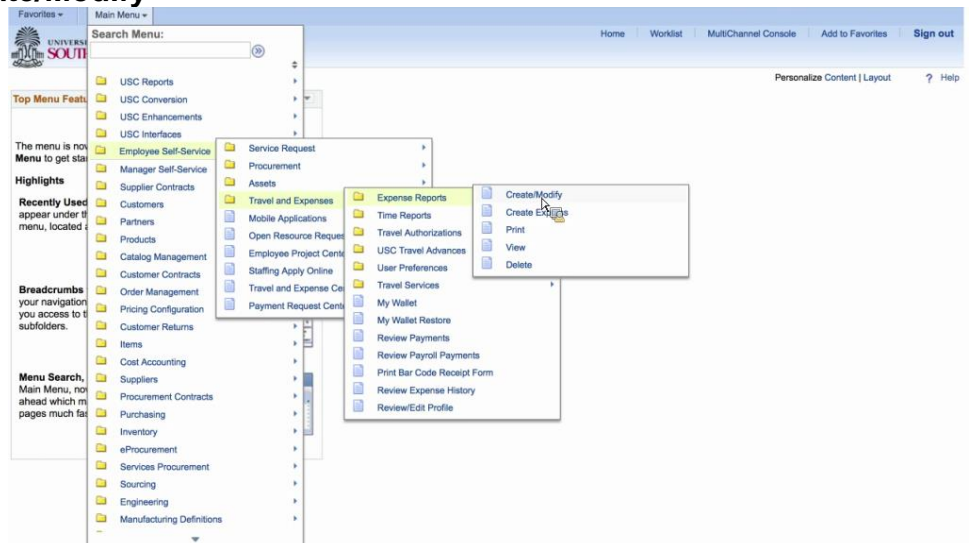- Travel Expense Reports have to be submitted in **PeopleSoft.**

- 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.**

  If this is not possible, then you will need to attach a note explaining why the Expense Report is being filed after the 7 day window.

INSTRUCTIONS

1. Items that you need to file your Expense Report:
   a. PeopleSoft TA number (should start with a number 1)
   b. Electronic copies of your receipts preferably in one PDF file.

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**
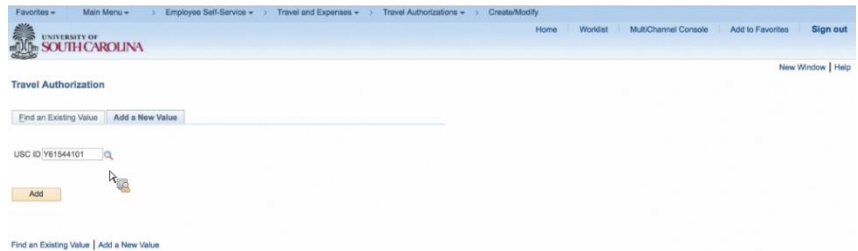
4. Enter your USC ID:

   If this field is already populated, check to see that it is your USC ID. Your USC ID should start with a letter followed by eight numbers.
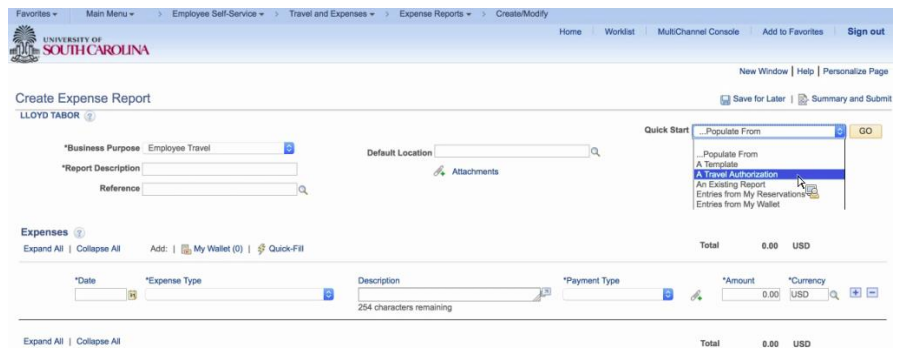
   You can look up your USC ID by clicking on the magnifying glass.

   Always be sure to correct and update banking information for validation as a traveler. (Updating information: Navigate to Main Menu > Employee Self Service > Travel and Expense > Review/Edit Profile)

5. Link the TA to your Expense Report:
   a. Navigate to: Quick Start (upper right corner) and pull down menu and select: A Travel Authorization and click Go.

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

6. 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. You can look up currency exchange rates on the internet. (www1.oanda.com/currency/converter/) Be sure to use the dates of travel for currency conversion.

b. Update the following fields for each expense:
   i. Description: only if necessary
   ii. Amount: Actual amounts (in US dollars)
   iii. Ticket number

c. You may need to create additional expense lines if:
   i. You stayed in more than one hotel
   ii. The hotel rates were different for different days***
      Each rate should have a different expense line
   iii. For meals reimbursements, there should be at least three meals expense lines:
      1. Day(s) traveling to event (include departure times in the description)
      2. Days at event (include range of dates in description)
      3. Day(s) returning from event (include departure and arrival times in the description)
d. Attach receipts (these can be in one large PDF document with all of the receipts).

7. Click **Save for Later** (upper right corner) to identify any errors that need to be fixed. When all errors are fixed and the transaction is ready for approval, click the **Summary and Submit** link (upper right corner).
8. Check the box and click the **Submit for approval** button.