

OFFICE OF THE CONTROLLER

General Accounting and Purchasing

How to Create a PeopleSoft Expense Report for Card Programs

April 2026



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South Carolina



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Card Programs Quick Overview



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Procurement Card Program

An efficient method for purchasing and paying for supplies, contractual services, memberships, fees and dues (with appropriate signature authority) up to a total value of \$4,999.99 inclusive of any applicable fees, taxes, and shipping.



- It can be used to purchase non-restricted commodities from vendors in person or electronically.
- It eliminates the need for issuing low-dollar purchase orders, reduces blanket purchase orders and minimizes the use of Payment Requests.



Team Card Program

Used only to make purchases for the legitimate team travel business benefit of USC.



- To be used for team travel related expenses-examples: hotel, transportation, meals, gas.
- Can be used for purchases of unforeseen incidentals related to team travel: i.e., snacks, supplies.
- Travel related Merchant Category Code.



Travel Card Program

Two Travel Card Options:

Individual Travel Card:

Used for airfare, hotel, and registration. This includes travel expenses for the cardholder only.



Department Travel Card:

Airfare and registration for individuals within the department. This includes employees, students and non-employees.



- Reduces the monetary burden on the traveler.
- An easier method to handle online registration.
- Eliminates the need to set up a Supplier to go through payment request.



Program Expense Card Program

Used for educational programs (e.g. Study Abroad, Summer Programs, etc.) and participant incentive payments.



- Credit cards are issued through Bank of America.
- Cards can only be issued to full time USC employees.
- Program Expense cards cannot be used for individual travel or any purchase subject to procurement.



Program Expense Card Program

This card CAN be used for

- Research Participant Incentives
- Student Programs (e.g. Study Abroad, summer and outreach programs where program participants are direct recipients of goods and services)



This card CANNOT be used for

- Individual Travel or any purchase that is subject to procurement.
- Purchase food for USC employees (unless acting as a chaperone for a program)



My Wallet

Understanding and Using



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What is My Wallet

Card transactions (charges) are interfaced from Bank of America into PeopleSoft My Wallet daily.



Cardholders and Liaisons can use My Wallet for reviewing and updating each of these card charges before they are consolidated into the Expense Report statement.

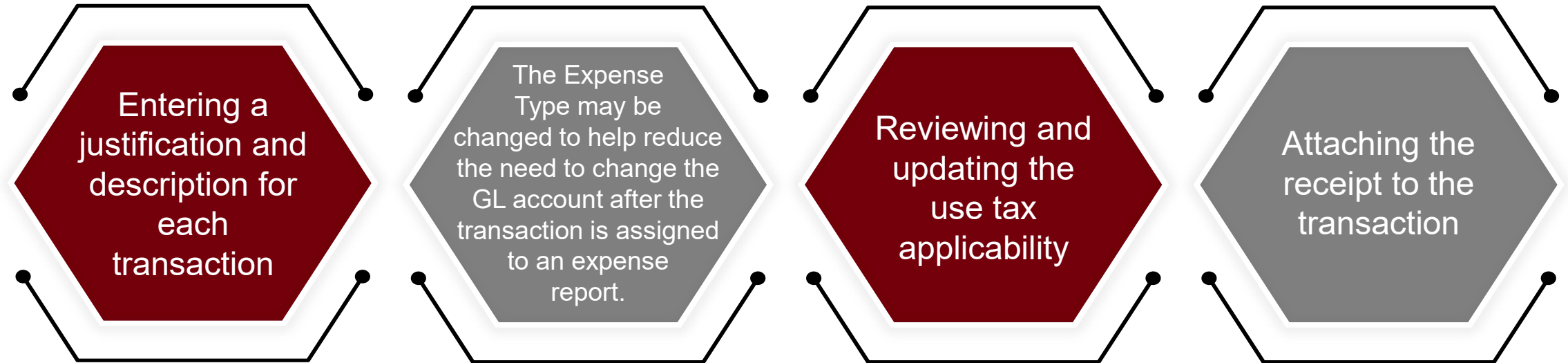
Please allow 1-2 additional days to interface into PeopleSoft.



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How to use My Wallet

The following can be updated using My Wallet:



All updates made in My Wallet carry over to the Expense Report.

Some of these requirements may be completed on the expense report page however, updating use tax applicability must be completed on the My Wallet details page.



Use Tax



Most purchases of tangible property are subject to sales or use tax.

If sales tax is charged on the invoice, **do not** check the “use tax” box in my wallet as this adds use tax to the purchase.

If it is necessary to apply use tax to a purchase made with your p-card, you can do so in my wallet by checking the “use tax” box.





Demonstration

- Using My Wallet



Expense Report
Create an Expense
Report



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Expense Report

- The PeopleSoft page is where all Procurement, Program, Team and Travel card transactions that represent the month end statement will be assigned.
- As the Liaison, your USC ID will default. Be sure to change if creating on behalf of the cardholder.
- It is important to select the correct **business purpose**. After selecting, the business purpose can't be changed.
- Use the Default Accounting for Report action to populate the accounting detail for each expense line. Just be sure to change it if different for a line(s).
- Begin your expense report early in the month and add My Wallet transactions periodically.
- If your department scans all receipts as one document (preferred method), this attachment may be added at the end of the month before the expense report is submitted.





Demonstration

- Creating an Expense Report



Using a Query to Review Expense Reports

Use this query to review Expense Reports: SC_EX_RPT_USER_INQUIRY_PMPTS

- Please select the correct Business Purpose.

To Review	Use the Business Purpose
Travel	EMPL
Travel Card	TRAVC
Employee Reimbursement (non-Travel)	REIMB
Procurement Card	PCARD
Program Card	PROGM
Team Card	TEAM

- Include the To and From accounting dates.
- The Default Location can be changed to In State, Out of State, or Foreign – if needed for a travel expense report.
- The Status can be selected - if needed.



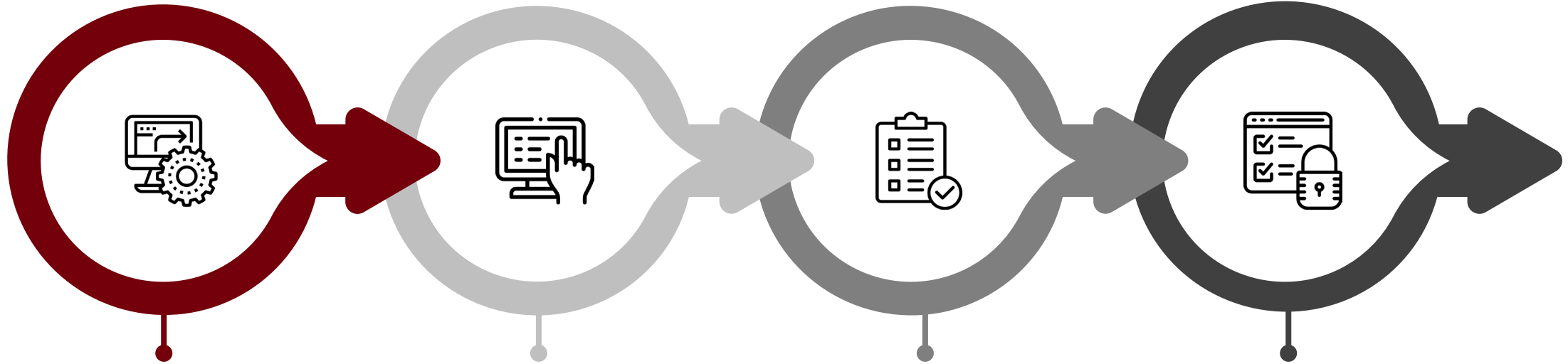


Demonstration

- Using the Review Expense Report Query



Compliance



Expense Reports must be fully approved in PeopleSoft within 30 days after the last day of the billing cycle.

P-Card Expense Reports due dates vary.

Cards will be suspended if transactions are not processed timely.

Be sure to complete a monthly audit/review before certifying.

Please remember expense reports are subject to external and internal audit and transactions are reported on spend transparency.



Card Billing Cycles

P-Card: 28th through the 27th of each month.

Program Card, Team Card, and Travel Card: 26th through the 25th of each month.



Statements may be retrieved within 48 hours after each billing cycle from [Global Card Access](#) website or app.

Expense Report Status

Status	Status Description
Pending Status	not submitted for approval. The expense report can be modified and deleted.
Submitted for Approval	the expense report is submitted, waiting for approval.
In Process	the expense report is in approval workflow.
Approved	approval for the expense report is complete and waiting on processing.
Paid	the expense report is processed and complete.

****Note:** Once in a “Paid” status, the transaction is posted to the General Ledger overnight. Expenses are posted to your budget when the expense report is paid.**



Card Violations



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P-Card Violations

Violations of policies/procedures include (but are not limited to):

- X The Purchasing Card is used for personal or unauthorized purposes.
- X The Purchasing Card is used to purchase alcoholic beverages or any substance, material, or service which violates policy, law or regulation pertaining to the University of South Carolina.
- X The Cardholder allows the card to be used by another individual.
- X Allowing a P-Card to be stored on a merchant site or account.
- X Allowing a P-Card to be automatically or recurringly charged.
- X The Cardholder fails to provide Department Liaison with required receipts.
- X The Cardholder fails to provide, when requested, information about any specific purchase.
- X The Cardholder does not adhere to all the Purchasing Card policies and procedures.



Team Card Violations

Violations of policies/procedures include (but are not limited to):

- X** Making personal or non-team related transactions on the card.
- X** Failing to provide receipts or documentation in a timely manner.
- X** Allowing another person to use the team card.
- X** Recurring violations of the policies and procedures will result in the card being revoked or other disciplinary action including possible employment termination.



Travel Card Violations

Violations of policies/procedures include (but are not limited to):

- X** Making personal or unauthorized transactions on the card. (examples: meals, first class airfare)
- X** Failing to provide receipts or documentation in a timely manner.
- X** The Cardholder allows the card to be used by another individual.
- X** Recurring violations of the policies and procedures will result in the card being revoked.



Program Expense Card Violations

Violations of policies/procedures include (but are not limited to):

- X Personal or unauthorized purposes
- X The purchase of alcoholic beverages or any substance, material, or service which violates policy, law or regulation pertaining to the University of South Carolina
- X The Cardholder allows the card to be used by another individual
- X The Cardholder fails to provide required receipts
- X The Cardholder fails to provide, when requested, information about any specific purchase
- X The Cardholder does not adhere to all the Program Expense Card policies and procedures



Program Expense Card Violations

An example of purchases NOT allowed on the Program Expense Card include (but are not limited to):

- X Departmental supplies (pens, paint, paper, file folders)
- X Coffee makers, microwaves, speakers, chairs
- X Software/subscription services
- X Food consumed by USC employees
- X Employee travel
- X Student travel to conferences
- X Payments for services rendered
- X Payments made to PeopleSoft suppliers (submit invoice through Payment Request)



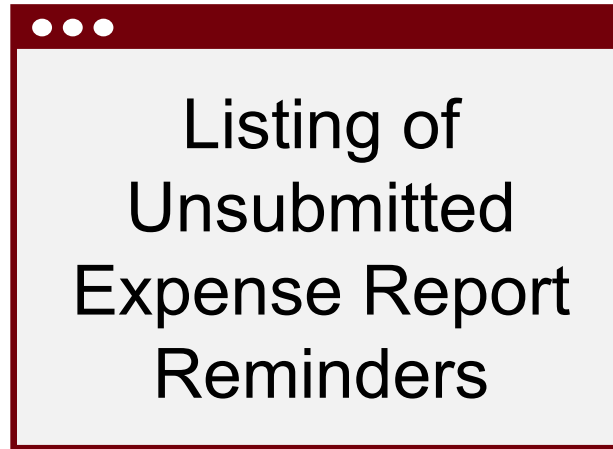
Notifications Expense Report



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Important Notifications

The following automated alerts are sent to the Liaisons every Wednesday:



Quarterly Report

- Report provides a list of outstanding P-card transactions that are currently delinquent.
- Cards are suspended throughout the year if expense reports are not processed timely.



Resources & Contacts



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Purchasing

Purchasing Home

COVID-19 Supplies

Our Staff

Solicitations and Awards

Procurement Card

Policies and Procedures

Participants and Responsibilities

Purchasing Toolbox

Small and Minority Business

Consolidated Services

Sustainable Initiatives

Purchasing Card

As state agency, the university participates in the Purchasing Card (P-Card) program. P-Cards help streamline low-value purchases of supplies, materials, equipment and services.

The Purchasing Card

A Visa credit card issued by Bank of America, the P-Card is an efficient method for purchasing and paying for supplies, contractual services, memberships, fees and dues (with appropriate signature authority) up to a total value of \$4,999.99. The card is to be used only for official University of South Carolina purchases.

This card will enable you to purchase non-restricted commodities from vendors in person, by phone, fax or internet directly. It eliminates the need for issuing low-dollar purchase orders, reduces blanket purchase orders and minimizes the use of Direct Expenditure Vouchers.

A P-Card will be issued in the employee's name with the State of South Carolina emblem, the wording "For Official Use Only" and "University of South Carolina" clearly indicated on the card.

Benefits of the Purchasing Card

Expand all

- For Cardholders +
- For The University +
- For Vendors +

Resources and Forms

[Process Control Map \[pdf\]](#)

[Policies and Procedures Manual \[pdf\]](#)

[Cardholder Request Form \[pdf\]](#)

[Department Liaison Request Form \[pdf\]](#)

[Department Head Compliance Certification \[pdf\]](#)

[Missing Receipt Affidavit \[pdf\]](#)

[Card Cancellation Form \[pdf\]](#)

[Card Dispute Form \[pdf\]](#)

Bank of America Documents:

- [Global Card Access User's Guide \[pdf\]](#)
- [Corporate Card Alerts \[pdf\]](#)

[PeopleSoft Training Related Resources \[URL\]](#)

Click on the "Team Card/Procurement Card" section.

Where to Find the Resources

For P-Card resources, visit the Procurement Card page found on the Purchasing website.



Office of the Controller

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General Accounting

Accounts Payable

Capital Assets

➤ **Card Programs**

Chart of Accounts

General Ledger

Miscellaneous Accounts Receivable

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

Card Programs

The Controller's Office Card Programs provide approved payment solutions for university programs, travel, team-related expenses, and research participant incentives.

The [Card Matrix \[pdf\]](#) provides a guideline of purchases allowed on each USC Card Program.

Card Program Contacts

Card Program	Contact
P-Card Purchasing Shared Service	pcardpurch@sc.edu
Program Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	travelcard@sc.edu
Tremendous	cards@mailbox.sc.edu

Expand all

P-Card Purchasing Shared Service 

Program Expense Card 

Team Cards 

Travel Cards 

Tremendous 

Where to Find the Resources

For Travel Card, Team Card and Program Expense Card resources, visit the [Cards Program](#) page found in the General Accounting section.





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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

Listserves

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.

Account Funding Change

Expand all

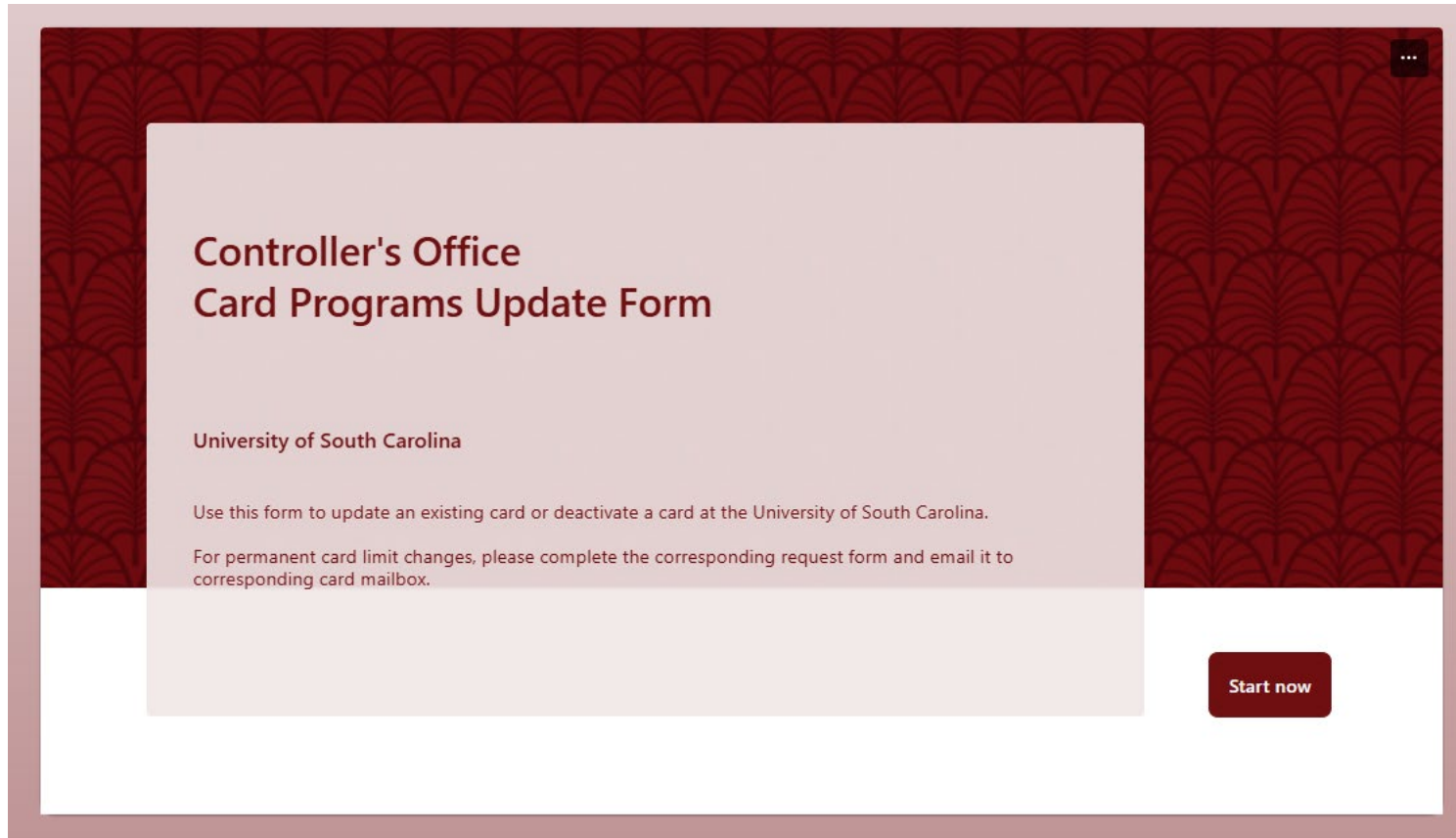
**AP Uploads****Business Expense Prepaid Cards****Cash Advances****Cost Transfer****Departmental Deposits****Employee Reimbursement (Non-travel)****Endowments****Finance Intranet**

Where to Find the Resources

For training resources,
visit our Business
Manager page in the
Resource and Training
Toolbox section.



Card Program Updates Form



Controller's Office
Card Programs Update Form

University of South Carolina

Use this form to update an existing card or deactivate a card at the University of South Carolina.

For permanent card limit changes, please complete the corresponding request form and email it to corresponding card mailbox.

Start now

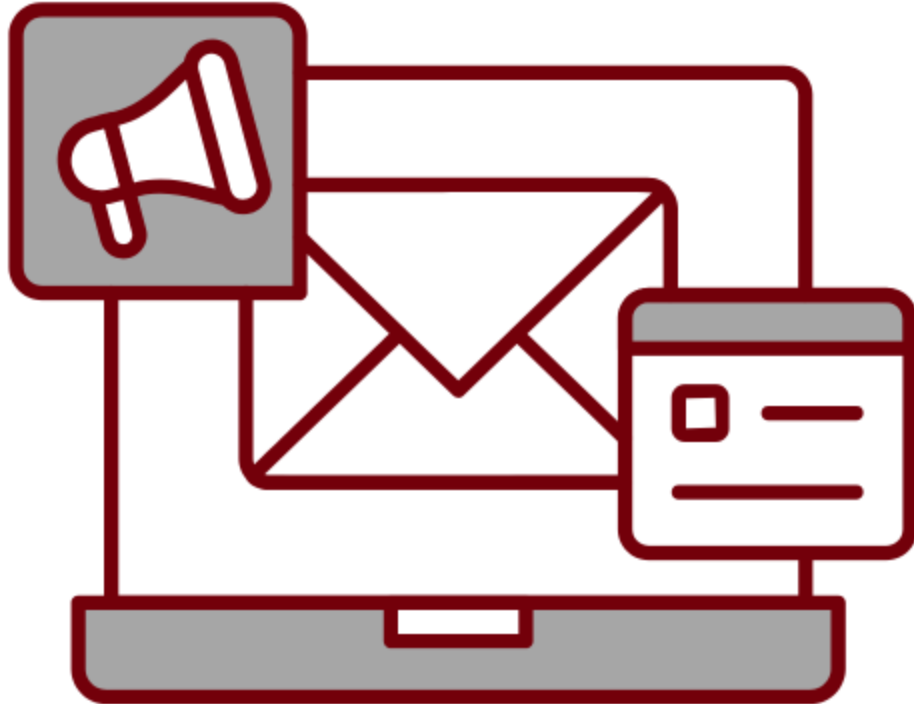
Use [this form](#) to update an existing card or deactivate a card at the University of South Carolina.

For permanent card limit changes, please complete the corresponding request form and email it to corresponding card mailbox.



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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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