OFFICE OF THE CONTROLLER

General Accounting – Travel TeamStudent/Non-Employee Travel eForms

February 2025





Table of Contents

New TA/TRV eForm Overview and Demonstrations	3
Policies and Procedures	10
Resources and Contacts	1;



TA & TRV eForms

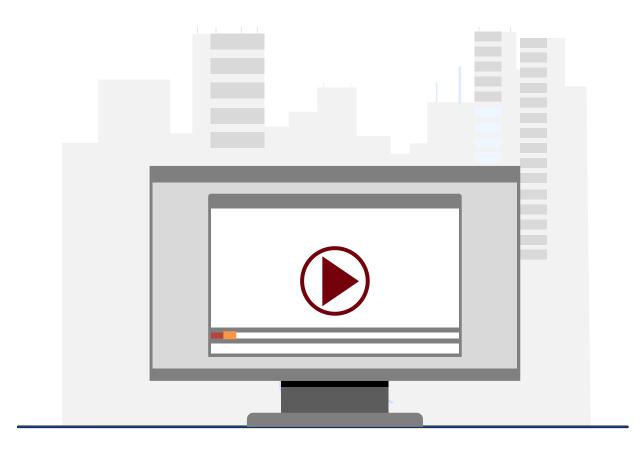


Student/Non-Employee Travel Authorization (TA)

- A TA is an estimate of travel expenses for a non-employee or student.
- Non-employees and students require a TA for all travel. (including direct bill to a supplier)
- The TA eform can be found in PeopleSoft Finance.
- Use the following navigation:
 Main Menu USC Finance eForms Student/Non-Employee Travel







Demonstration

 Completing a TA for Non-Employees and Students



Student/Non-Employee Travel Reimbursement Voucher (TRV)

- A Travel Reimbursement Voucher (TRV) is used to reimburse non-employees and students.
- The TRV eform can be found in PeopleSoft Finance.
- Use the following navigation:

Main Menu – USC Finance eForms – Student/Non-Employee Travel

- To expedite the reimbursement of travel expenses:
 - ✓ Include payee name, valid address, dates, destination, time of departure and return.
 - ✓ All paid receipts for expenses that show proof of payment.
 - ✓ Paid itemized receipt for lodging.
 - ✓ Original paid airfare receipt with name of traveler, dates, flight information, class of service, amount proof of payment and ticket number.



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

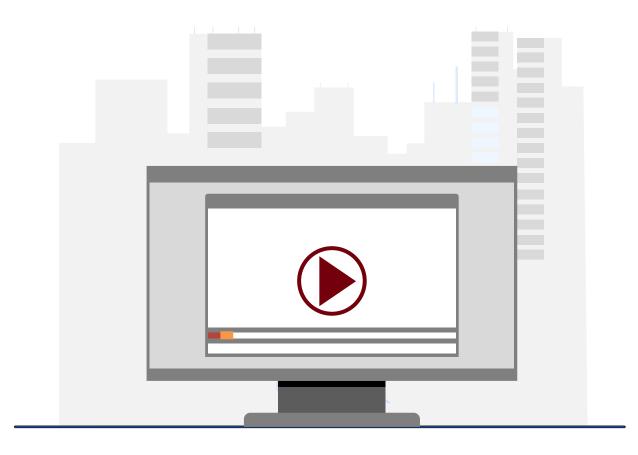
- In-State, Out-of-State, & Canada follow the above rates.
- <u>U.S. Department of State Foreign Per Diem Rates</u> based on country, location, & date.
- NO MEAL REIMBURSEMENT FOR ONE DAY TRAVEL.



Understanding the Different Form Status

eForm Status		
Saved	The TA/TRV eForm has not been submitted.	
Withdrawn	The creator of the TA/TRV has cancelled the eForm and therefore it cannot be resubmitted.	
Pending	The TA/TRV eForm has been submitted and waiting for approvals.	
Denied	An approver denied the TA/TRV and therefore it cannot be resubmitted.	
On Hold	An approver has put the TA/TRV on hold, but the creator and approver can continue to make changes to the TA/TRV and resubmit using the Update TA/TRV option on the landing page.	
Executed	The TA/TRV is fully approved and is assigned an ID.	
Recycle	An approver has returned the TA/TRV to the creator. When recycled, only the creator can make changes and resubmit using the Update TA/TRV option on the landing page. The form status will show partially approved.	





Demonstration

 Completing a TRV for Non-Employees and Students



Policies & Procedures



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, the TRV 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.
- No inclusion of personal travel.
- Study Abroad does not go through Travel.
- 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



and students.

Capital Assets

Chart of Accounts

Moving and Relocation

Treasury Management

Grants and Funds

Compliance and Tax

Payroll Department

External Financial Reporting and Transparency

Resource and Training

Management

Management

Operational Management and Reporting

Toolbox

Contact Us

General Accounting Staff

General Ledger

Travel

Directory

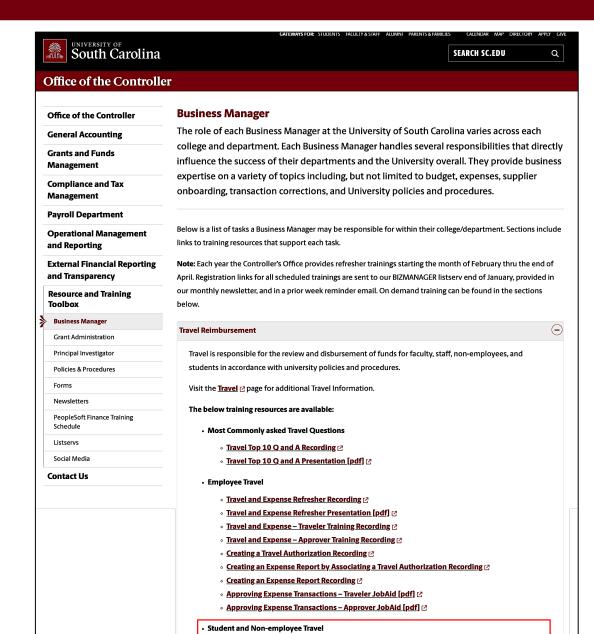
Expense Module Correction Form Travel Advances Travel Agencies Travel Reimbursement Voucher (TRV) Updating Banking Information Expand all Output Travel Report Expand all Output Travel Reimbursement Output T

travel payments and reimbursements for faculty, staff, non-employees

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 [2]

Where to Find Resources Referenced in this Presentation





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] [7]

Where to Find Resources

For TA/TRV training resources, visit our <u>Business Manager</u> page.



Travel Office Resources

- Contact Us: tesubmit@mailbox.sc.edu
- Controller's Office Travel Page: <u>https://www.sc.edu/about/offices_and_divisions/controller/general_accounting_travel/index.php</u>
- Travel Policy: https://sc.edu/policies/ppm/fina250.pdf
- Travel Procedures: https://sc.edu/about/offices_and_divisions/controller/documents/fina100_procedure.pdf



Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
Accounts Payable General Email Address	ap@mailbox.sc.edu
General Email Address	ap@mailbox.sc.edu
General Email Address AP Uploads	ap@mailbox.sc.edu apupload@mailbox.sc.edu
General Email Address AP Uploads Supplier Maintenance	ap@mailbox.sc.edu apupload@mailbox.sc.edu apsupplr@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Program Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	trvcard@mailbox.sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	concpl@mailbox.sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Time and Effort Reporting	timeandeffort@sc.edu

Controller's Office Contact List

Grants and Funds Management	Email Address
Sponsored Award Specific Questions	Contact your Post Award Accountant (PAA)
Payroll	Email Address
General Email Account	payroll@mailbox.sc.edu



Questions



THANK YOU!



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

Office of the Controller



Address:

1600 Hampton Street Columbia, SC 29208



Contact Number:

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



Email Address:

controller@sc.edu



