





Program Expense Cardholder Training







What is the Program Expense Card?



- Program Expense cards are issued to employees as a convenient means of procuring goods and services.
- Being a cardholder comes with important responsibilities.
- Cardholders must follow all university and division policies and procedures.
- This training is for divisional employees who wish to obtain and properly use a *Program Expense Card*.

Rights and Responsibilities



- Program Expense cards are issued to employees as a convenient means of procuring goods and services.
- Being a cardholder comes with important responsibilities.
 - Cardholders must follow all university and division policies and procedures.
- This training is for divisional employees who wish to obtain and properly use a *Program Expense Card*.

What can I purchase with Program Expense Card?



The Program Expense Card is **solely** for purchases **related to student programming** where the students are the direct recipient of the purchased goods and services.

Allowable purchases include:

- Food for USC students participating in a student related/educational program, study abroad, or domestic student trip.
- Purchases made for Student Travel, including Study Abroad, such as hotels, meals, entrance fees, etc.
- > Program supplies directly related to a student/educational program are permissible.
- > Gift Cards for door prizes and participation rewards.

How do I request a Program Expense Card?



Detailed information on how to request a Program Expense card can be found in the divisional ticketing system at:

https://www.sa.sc.edu/saastix/

Helpful information for all card types can be found on the "Resources" tab. Purchasing, Travel, and Program Cards

Purchasing, Travel, and Program Cards

- NEW Program Expense Card Information & Procedures
- NEW Purchasing Card Information & Procedures

NEW Travel Card Information & Procedures

Submit a ticket request with the required information. A Procurement Team member will review, and if approved submit to the Controller's office for completion.



Will I receive additional training and support?



What is an "Expense Report" and why is it necessary?

The University requires employees to submit an Expense Report to validate that expenditures are made according to university policies, procedures, and South Carolina procurement laws.

When the expense report is completed and accepted by the Accounts Payable department a payment is made to settle the credit card's outstanding balance with the bank.

As with your personal credit card -> you review the statement to check your saved receipts against the purchases listed. You determine if there are discrepancies or errors, and if everything checks out you process a payment to reimburse the bank. The university's card expense reporting process works on the same principal.

Let's demonstrate how this works....

How to complete the PeopleSoft - Expense Report for a Program Expense Card.



Review My Wallet Receipts

Sarah Cassidy

Search Criteria 💿

| Fro | om Posting Date | 03/26/20 | 23 🛗 Throug | h Date 04/25/2024 | 4 🖽 | Search | | |
|-----------------|-------------------|----------|------------------|-------------------|--------------|----------|--------------------|---------------------------|
| *Rece | eipt Data Source | All Data | Sources | | • | | | |
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| *Acc | ount Number | ******* | ****8272 🗸 | | | | | match what is on your |
| Details ⑦ | | | | | | | | Bank of America |
| E, Q | | | | | | | | Statement. Select "Card |
| Mark for Delete | Account Number | | Transaction Date | Posting Date | Expense Type | Merchant | Additional Details | Program" for card you are |
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| Add Expense ⑦ | | | | | | | | Search. |
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| Details ⑦ | | | | | | | | | |
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| Add Expense ⑦ | | | | | | | | | |
| | Expense Type | | | ~ | • | Add | | | |

Notice all transactions that fall within the specified date range have populated. If you do not adjust your date range, you would see transactions that fall outside of the statement date. Click on "Other Supplies" under expense type.





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Here, you can see the transaction you selected.

> | View All

1 of 5 🗸

>

If you select view all in the top right, it will populate all transactions in that date range.

This page allows you to add descriptions, attachments, and most importantly tax.

If a receipt you received wasn't levied tax, you would simply check the box that reads, "Apply Use Tax."

| Transaction Date | 04/09/2024 | | |
|-------------------------------------|---|-----------------------|----------------------------------|
| Payment Type | Prepaid Payments ~ | Attachments | |
| Cardmember Number | *************************************** | Ennanced Data | |
| | FAMILY DOLLAR | | |
| Transaction Amount | 41.04 | Use Tax Applicability | |
| Currency | USD | Apply Use Tax | |
| Exchange Rate | 1.0000000 | Office Q | This simply shows where your |
| | Default Rate | Location | description should go. When you |
| Base Currency Amount | 41.04 USD Update | _ | have added all your descriptions |
| Description | ADD YOUR DESCRIPTION HERE!!! | | and applied tax where necessary |
| City | 226 characters remaining | | scroll to the bottom of the page |
| | COLUMBIA | | and select save |
| > Receipt Details/Summary/Breakdown | า 🕐 | | |
| Return to My Wallet | | | |
| Add Expense ⑦ | | | |
| Expense Type | ~ | Add | |
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| Review | My | Wallet | Receipts |
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Sarah Cassidy

Search Criteria ⑦

| From Posting Date | 03/26/2023 | Through Date 04/25/2024 | Ħ | Search |
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| *Receipt Data Source | All Data Sources | ~ | | |
| *Transaction Status | Unassigned | ~ | | |
| *Card Program | Program Card | ~ | | |
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| Add Expense ⑦ | | | | | | | | | | | |
| | Expense Type | | | ~ | | Add | | | | | |

Once saved, you are brought back to the main My Wallet screen. Notice, under "Additional Details" there is a description that was provided for that particular transaction. At this point, everything has been completed in My Wallet and we can now navigate to the expense report.

Note: You can update My Wallet as you make purchases or do it all at once when you are ready to create the expense report.

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Create Expense Report

My Wallet

Report ID NEXT

Below is a complete list of unassigned wallet transactions. To view all transactions please go to the wallet menu option under "Other Expense Functions".

Select All Deselect All

Select items and select if a Personal Expense. Press 'Done' to add them to the expense report.

Unassigned Wallet Entries ③

| Select | Logo | Account Number | Transaction Date | Posting Date | Expense Type | Merchant | | Amount | Curren |
|--------|------|---|---------------------|--------------|----------------|------------------------|---------------|--------|--------|
| | - | *********8272 | 04/26/2024 | 04/29/2024 | OTHER SUPPLIES | MONTERREY MEXICAN REST | Enhanced Data | 40.91 | USD |
| | | *************************************** | 04/11/2024 | 04/12/2024 | OTHER SUPPLIES | TSUNAMI VISTA | | 204.87 | USD |
| | | *************************************** | 04/10/2024 | 04/10/2024 | OTHER SUPPLIES | AMZN Mktp US | Enhanced Data | 105.52 | USD |
| | | *************************************** | 04/09/2024 | 04/10/2024 | OTHER SUPPLIES | AMAZON.COM*PF8179QU3 | Enhanced Data | 58.30 | USD |
| | | *************************************** | 04/09/2024 | 04/10/2024 | OTHER SUPPLIES | DOLLAR TREE | Enhanced Data | 68.85 | USD |
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Done

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| • 04/09/2024 | OTHER SUPPLIES | | ~ | Description of what | at was purchased here | <u>ب</u> | Prepaid Payments | ~ | 58.30 US | SD | | |
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What happens when my Expense Report is sent back?



First, know that errors will occur, and mistakes will be made. You will make them, and they will help you learn what to do. So, do not be frustrated or discouraged when an error occurs.

REPORTS DO GET SENT BACK FOR CORRECTION! Use it for a learning opportunity and reach out to the Procurement Team for help! The rules are not hard to learn - its strictly a matter of familiarity. With time and experience you will learn all the purchasing requirements.







THANK YOU FOR PARTICIPATING IN THIS TRAINING SESSION. ANY QUESTIONS?



| | EVENT JUSTIFIC | CATION & ATTENDANCE | | |
|----------------|--|--|--|--|
| | | | 1 | [|
| EVENT TITLE: | | | MEETING DATE: | |
| FACILITATOD: | | | | |
| PACIEITATOR. | | | LOCATION. | |
| | This event will provide a study break for student allowing them the op | portunity to relax and decmopress from | their exam preparation. The event will | include coffee and snacks to refresh and |
| JUSTIFICATION: | | | | |
| | | | | |
| | | | | |
| Attendee Name | Signature (# required) | Title (staff or student) | Phone | Email |
| Shirley Temple | Shidey Temple | staff | 803-777-1234 | |
| W. C. Fields | W. C. Fields | student | 409-333-1234 | |
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Helpful Tip To Ensure Compliance:

Use an "Event Justification and Attendance" report to document:

- the event details (place, time, etc.)
- the justification as a student programming activity, and
- And keep an official record of participants.

This is required for all food letters.

Attach the "Event Justification and Attendance" report to your expense report for relevant expenses.

| EVENT JUSTIFICATION & ATTENDANCE | | | | | | | |
|----------------------------------|-------------------------|--------------------------|---------------|-------|--|--|--|
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| EVENT TITLE: | | | MEETING DATE: | | | | |
| FACILITATOR: | | | LOCATION: | | | | |
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| JUSTIFICATION: | | | | | | | |
| Attendee Name | Signature (If required) | Title (staff or student) | Phone | Email | | | |
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This example of an "Event Justification and Attendance" Form can be found on the **RESOURCES** page in the SAASTix System