# OFFICE OF THE CONTROLLER

## Card Programs Top 10 Q and A

January 2026

UNIVERSITY OF
**South Carolina**

# Table of Contents

UNIVERSITY OF
South Carolina

# Top 10 Card Programs
# Q and A

# #1 Card Program Q and A

**When is my Expense Report due and what dates should be included?**

✓ Expense reports must be fully approved within 30 days of the end of the billing cycle for the card statement.

✓ Choose transactions that match the posted charges to your statement to avoid timing mismatches on your report.

✓ Late report submission can lead to card suspension and delayed financial posting.

✓ Each card program's billing cycle has a specific date range (e.g., Program, Team, and Travel cards run from the 26th–25th).

# #2 Card Program Q and A

## How do I access My Wallet and Expense Reports?

**Pro Tip:** Ensure you are accessing PeopleSoft Finance.

Updating details in My Wallet ensures clean posting into your Expense Report.

✓ Use the **Expense Reports** page to assign, edit Chartfields, add receipts, and submit for approval.

✓ You can locate the pages using the navigations below:

- **Main Menu > Employee Self-Service > Travel and Expenses > My Wallet**

- **Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Create/Modify**

# #3 Card Program Q and A

## What do I include when submitting my Expense Report?

Required documentation includes:

- ✓ The Bank of America statement showing card activity.

- ✓ Itemized receipts for every transaction.

- ✓ Justification for each charge and business purpose.

- ✓ Program Expense Cards require participant lists or documentation supporting the program activity.

# #4 Card Program Q and A

**How can I find and download my monthly billing statement?**

**Tip:** Download the statement as soon as it becomes available and label it clearly

- ✓ You can download your statement within 48 hours after the billing cycle ends.

- ✓ Statements can be downloaded from Global Card Access website or app.

- ✓ Download the current statement to attach to your Expense Report.

# #5 Card Program Q and A

**What happens if my card is lost, stolen, or compromised?**

- ✓ Immediately contact Bank of America at 1-888-449-2273, which is also on the back of your card to report the issue.

- ✓ Notify the Controller's Office at cards@mailbox.sc.edu.

- ✓ The card will be canceled, and a replacement will be issued once all security and audit requirements are met

# #6 Card Program Q and A

## Can my business manager or a department admin assist me with my Expense Reports?

**Tip:** Review all reports carefully — the cardholder remains responsible

- ✓ Yes, business managers or department administrators may assist by preparing Expense Reports on your behalf.

- ✓ They must be set up in PeopleSoft Finance to access your transactions for each cardholder they will assist.

- ✓ The cardholder is still responsible for accuracy, completeness, and timely submission.

# #7 Card Program Q and A

**How can I make changes to my card information or default chartfields?**

✓ Use the appropriate **Card Programs Form** to update an existing card or deactivate a card.

✓ Use the form to

- Permanent Card Limit Change
- Temporary Spend Limit Change
- Exact Authorization Override
- Add or Change Liaison
- Change in Chartfield
- Change Card Intended Use (Program Card)
- Updated Cardholder Information

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

# #8 Card Program Q and A

## For what expenses can I use the Travel Card?

**Common Mistake**: Carefully review descriptions and Chartfields

- ✓ Airfare, hotel, and registration for travel directly related to University business.

  - • Use itemized travel receipts (hotel folio, complete airfare including flight details and class of service)

- ✓ Individual Travel Card covers one traveler; Department Travel Card may cover airfare/registration for department travel.

- ✓ Travel Cards should **not** be used for items outside allowable travel expenses (e.g., unrelated registrations).

# #9 Card Program Q and A

## For what expenses can I use the Program Card?

**Common Mistake:** Not including the participant list and itemized receipts

✓ Purchases for educational programs, such as study abroad and outreach events.

✓ Participant incentive payments, including research gift cards and small awards.

✓ One-time, nominal amount for a program prize/award

✓ Approved group meals/expenses for educational programs (meals only allowed for program participants)

✓ Cannot be used for individual travel or items subject to procurement rules.

# #10 Card Program Q and A

## For what expenses can I use the Team Card?

**Common Mistake:** Not including personal consumption memo and participant list

- ✓ Expenses related to athletic team travel and activities (Hotel, Transportation, Team meals, Group activities/ticketed events)

- ✓ Snacks, drinks & supplements for games, practices and team events

- ✓ Meals for an entire athletic team

- ✓ Activities for an entire athletic team

- ✓ Designed for team benefit, not for individual purchases or non-team expenses.

# Questions

# Resources & Contacts

UNIVERSITY OF
South Carolina

# Card Program Resources

- Card Matrix
- Program Expense Card Request Form
- Program Expense Card Update Form
- Program Expense Card Missing Receipt
- Program Expense Card FAQ
- Team Card Request Form
- Team Card Update Form
- Team Card Missing Receipt Form
- Travel Card Request Form
- How to Create an Expense Report for Card Programs Recording
- How to Create an Expense Report for Card Programs Presentation
- Program Expense Card Recording
- Program Expense Card Presentation
- My Wallet Team Card Webinar Recording
- Using My Wallet Job Aid
- Expense Report Team Card Webinar Recording

- Creating a Card Statement Expense Report Job Aid
- Team Card Approver Webinar Recording
- Team Card Approver Presentation
- Approving a Card Statement Expense Report Job Aid
- Using the My Wallet Pivot Grid Webinar Recording
- Using the My Wallet Pivot Grid Job Aid
- Travel Card Program Webinar Recording
- Travel Card Program Presentation
- Travel Card Job Aid
- Travel Card Descriptions One Page Reference
- Finding a Pending Travel Card Expense Report
- Creating Travel Card Expense Reports

UNIVERSITY OF **South Carolina**

# 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.

# Where to Find the Resources

For Accounts Payable training resources, visit our Business Manager page.

# 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** |
| General Email Address | ap@mailbox.sc.edu |
| AP Uploads | apupload@mailbox.sc.edu |
| Supplier Maintenance | apsupplr@mailbox.sc.edu |
| **Travel Office** | **Email Address** |
| General Email Address | teoffice@mailbox.sc.edu |
| Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers | tesubmit@mailbox.sc.edu |

# Controller's Office Contact List

| Capital Assets | Email Address |
| --- | --- |
| Physical Inventory | physinv@mailbox.sc.edu |
| Capital Leases | lease@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 | travelcard@sc.edu |

| Compliance and Tax | Email Address |
| --- | --- |
| General Compliance Email Address | controllercompliance@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) |

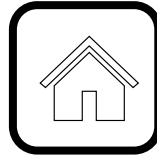| Payroll | Email Address |
| --- | --- |
| General Email Account | payroll@mailbox.sc.edu |

UNIVERSITY OF
**South Carolina**

# THANK YOU!

## 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

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

UNIVERSITY OF
**South Carolina**