Attach a T-Card Transaction

The University of Illinois System Travel Card (T-Card) is a charge card that may be used by system employees to purchase qualified travel expenses and business meals. If a travel related expense was purchased with a T-Card, an Expense Report (ER) must be created and the T-Card transaction must be attached to that ER.

Step	Task
1.	Click the **Expense Report** icon.
2.	Complete the **Document Header** information. 1) Enter a unique report title in the **Report Title** field. 2) Select the **Purpose** of a. *Arranged Travel – Employees (T-Card),* b. *Arranged Travel – Non-Employees (T-Card),* or c. *Employee Travel/Meal Reimbursements and T-Card Charges.* 3) Enter a business purpose or justification in the **Business Purpose/Justification** field. 4) Enter the traveler's name and university identification number (UIN) in the **Traveler Name** and **Traveler UIN** fields. 5) Select an affiliation from the **Payee Affiliation** menu.
3.	Click the **Continue** button.
4.	Click the **Transactions** button. **NOTE:** If the expense type incorrectly defaults, it can be changed by completing these steps: 1) Click the **Find Project** (Binoculars) icon for the charge. 2) Select an **Expense Type** from the menu. 3) Click the **Save** button.
5.	Select the check box next to the transaction to attach.
6.	Click the **Attach** button.
7.	Click the **Done** button. **NOTE:** To avoid reimbursing yourself, ensure "Bank of America Travel Card" appears in the Payment Type column for the attached transaction.
8.	Click the **Items** tab.
9.	Click the **Edit Item** icon.
10.	Select **Expense Type** from the menu. **NOTE:** If the expense type was pre-populated, it cannot be changed here—proceed to step 11.
11.	Click the **Save** button.
12.	Enter information in the fields under **Standard Information.** The fields that display may vary depending on the Purpose.

Step	Task
13.	Select a C-FOP from the **Project** menu under **Charge Code Allocations.**
14.	Enter a note in the **Notes** field if necessary.
15.	Click the **Save** button.
16.	Repeat steps 4 through 15 to add additional **Expense Types.**
17.	Attach any receipts if necessary. For more information on how to attach receipts, review the *Browse and Attach Receipts* job aid.
18.	Click the **Submit** button.
19.	Read the certification information, and click **View Policy** if necessary.
20.	Click the **Continue** button.

For more information, refer to the *Create an Expense Report (ER)* job aid.