# Attach a T-Card Transaction

The University of Illinois Travel Card (T-Card) is a charge card that may be used by University 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.<br><br>1) Enter a unique report title in the **Report Title** field.<br>2) Select the **Purpose** of<br>a. *Arranged Travel – Employees (T-Card),*<br>b. *Arranged Travel – Non-Employees (T-Card),* or<br>c. *Employee Travel/Meal Reimbursements and T-Card Charges.*<br>3) Enter a business purpose or justification in the **Business Purpose/Justification** field.<br>4) Enter the traveler's name and university identification number (UIN) in the **Traveler Name** and **Traveler UIN** fields.<br>5) Select an affiliation from the **Payee Affiliation** menu. |
| **3.** | Click the **Continue** button. |
| **4.** | Click the **Transactions** button.<br><br>**NOTE:** If the expense type incorrectly defaults, it can be changed by completing these steps:<br><br>1) Click the **Find Project** (Binoculars) icon for the charge.<br>2) Select an **Expense Type** from the menu.<br>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.<br><br>**NOTE:** To avoid reimbursing yourself, ensure "JPMC University 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.<br><br>**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.