



Quick Guide: Faculty Travel

2016-17

PSYCHOLOGY DEPARTMENT QUICK GUIDE: TRAVEL

WHAT'S INSIDE

First things first....

This guide was written with the busy faculty member in mind. The information here is not meant to be an exhaustive compendium to SJSU travel but rather to provide instructions on key points and processes. Ultimately, it is my hope to make it a little easier to navigate the various travel rules and processes we have on campus.

What's covered?

There are a lot of reasons why a claim or expense will be denied and my goal is to get you thinking about potential pitfalls to avoid before they become problems. With that in mind, there are some key steps that are covered that if followed will minimize any snags.

It's complicated

On this campus there are a minimum of three different travel processes (SJSU, Tower, and Research) that sometimes overlap each other. The rules and policies governing each entity may differ and changes in policy are not only certain but constant.

Making sure that you have the latest information will keep you on top of things and avoid any pitfalls

Good to Know

Lastly, I have included links to the various travel guides that have served as the main sources for the information I have provided. In addition there are helpful links to tutorials and forms.

The more things change...

As stated, this guide is here to get you started. If you have a special circumstance, or complex question about travel that is not covered here, please do not hesitate to ask for help.



[Travel Authorization: What to keep in mind.](#)

What you must include for a successful submission. Page 2

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[Traveling Scenarios](#)

This section will go over common scenarios faculty encounter that may be a potential pitfall during the reimbursement process. Page 4

[Important SJSU travel links](#)

Looking for tutorials or specific detailed information on travel guidelines. Find links to these items and a few more. Page 5

[Travel Funds at a Glance](#)

Get a quick overview of the most common travel requests/action items for all three financial entities on campus. Page 6



Before you go...

Authorization to travel

In order to ensure a complete and successful travel reimbursement it's important to plan early and there are a few considerations to think about as you prepare your travel authorization in [FTS](#).

- ➔ All faculty, staff, and students are required to obtain authorization to travel **prior** to the start of any business trip.
- ➔ You will need to determine the funding source i.e. state funds, Tower or Research Foundation, etc., which will be used to reimburse your trip.
- ➔ Be sure to indicate in the "Additional Trip Details" box what that source is, even when funds are coming from non-SJSU operating funds. **Upload any emails that give information about funding.**
- ➔ Estimates for travel expenses are required. Be as realistic about your costs as you can be, try to estimate enough to cover expenses up to your funded amount.
- ➔ If you are traveling for a conference or presentation upload the confirmation email or letter.
- ➔ **REMINDER:** International travel requires at least 30 days in advance (must reach the President's office at least 30 days in advance); 45 is recommended for countries not deemed high hazard; 45 days is required for those countries that are considered high hazard.
- ➔ **REMINDER:** Monitor the progress of your Travel Authorization in FTS. You don't want to find out too late that you missed an email from an approver with questions for you.

IS THIS REALLY NECESSARY?

Keep in mind, neither SJSU nor any of the auxiliaries will process a reimbursement unless an approved authorization is on file.

***Research Foundation also requires an additional approval before travel.



I DO NOT THINK THIS APPLIES TO ME!

Regardless of funding source or expectation of reimbursement, anyone who represents themselves as a student, faculty, or staff member of SJSU at a conference, while performing research, etc. must fill out an authorization. This is especially important if you are traveling during the academic year i.e. duty days.

When student's travel.....

SJSU students are also expected to adhere to all the same policies and guidelines that we do. It is our responsibility to ensure that they are aware of the established policies and guidelines.

Regrettably, students are more likely to have missed a step in the process or have an expense denied. The good news is that most are preventable with just a little bit of help from us.

One way to help them would be to point your lab/advisees/mentees to the student version of this guide on our website. Another would be to direct them to the Mexican American Studies department office with questions.

As soon as a student presenter has received acknowledgement that their poster or paper has been accepted have them fill out the *Request for Approval of Travel or Authorization to Travel* (depending on funding), unlike faculty and staff they fill out a paper version and not the online FTS version (unless they are student employees).

This is very important, even if students are not receiving funding to travel, there are issues related to risk management that require this document be in place before they travel. Most students are not aware of the need to fill this out before travel and may assume that they are covered.

DID YOU KNOW?

Duty Days

If you are going to miss class due to travel, you must indicate how your courses will be covered.

Prepaid Expenses

Your travel claim needs to clearly indicate any prepaid (meaning department has paid on your behalf) travel expenses. This would include any direct billed airline, hotel, or rental car expenses.

Research Foundation's 2 Step Pre-Approval Process

Do not forget to convert your FTS authorization into a pdf and email it to department administrator.

30 Days

All reimbursements must be submitted within 30 days after the end of your trip.

COMPLETELY USELESS TRAVEL FACTS

74%

According to the Bureau of Transportation statistics three fourths of all business related travel is less than 250 miles from home.

32%

Of business travelers would ban sprawlers on flights. Source: 2015 Travizon Business Survey, <http://tinyurl.com/hyb7yoz>



Travel Claim

Best Practices

Regardless of your funding source you will be required to submit a travel claim if you received a travel advance, or wish to be reimbursed for expenses incurred. The sooner you begin the process the better, this allows us to work on any issues where timeliness is critical.

The travel claim process will largely depend on your funding source.

Reimbursement Process: State Funds

If your travel is going to be reimbursed from our General Fund, Miscellaneous Trust, or CERF you will be required to use the online FTS travel reimbursement process. One advantage of using this process is that it conveniently transfers the information from your authorization to the claim. Another advantage is that you will be required to scan and upload your receipts to your claim; minimizing the chance of having a lost receipt.

Reimbursement Process: Auxiliaries:

If your travel is going to be reimbursed with funds in either Research or Tower Foundation they do not utilize an online process. Instead you will be required to fill out their form and submit your original receipts for processing.

Here are a few best practices to follow for a smooth and expedited travel claim:

- ➔ Provide copy of your travel authorization.
- ➔ Submit original receipts. In most cases copies are not acceptable.
- ➔ Include a copy of the conference program listing your presentation/poster.
- ➔ Submit itemized credit card receipts for expenditures; credit slip only is not acceptable.
- ➔ Daily lodging rate is calculated by adding up taxes and hotel rate together.
- ➔ If claiming mileage include a map i.e. MapQuest, Google Map, etc., with the start and end point address to document miles traveled. Remember to include going and return miles on the claim.
- ➔ Include airfare quote if you drove instead of traveled by airline.
- ➔ If using Per Diem, meal rates on the first and last day is calculated at 75% (Research Foundation Only).
- ➔ Use notes area to explain business expense or unusual circumstances.
- ➔ If the payment method is ambiguous or lost include a copy of your bank statement as proof of payment.

Traveling with others and personal time!

There are times when it makes sense to share expenses with a colleague. Or you may choose to bring family along with you to a conference. While there is nothing wrong with this, following are a few considerations to think about in order to make your reimbursement process go smoother.

Lodging and Meals:

- ⇒ If both travelers work for SJSU and also intend to submit a reimbursement for their hotel stay there are two methods they can use.
 - Make sure the hotel invoice has both their names listed for all of the days they stayed. Or
 - Ask the hotel to split the days between the two travelers on separate receipts.
- ⇒ The CSU has implemented a \$275 per night maximum lodging rate, excluding taxes. If your hotel rate is in excess of this amount it must be pre-approved by the Provost. You must provide an explanation as the reason necessary to stay at hotel in the trip details box when filling out the authorization. **(Only Applies to SJSU funds; not auxiliaries)**
- ⇒ To per Diem or not. Research Foundation allows a traveler to submit actual receipts for meals and lodging or to request the per Diem for the city they traveled to.
- ⇒ CSU funded travel will reimburse meals based on actual amounts up to \$55.00 per day. An individual meal costing more than \$25.00 has to have a detailed receipt.
- ⇒ Tower Foundation *only* accepts actual cost for each meal.
- ⇒ If you pay for student's or colleagues meals please submit their names along with receipts. List as a business expense and add a note on the claim.

Car Rental and Personal Car Use

- ⇒ If deciding to travel by car rather than by airplane compare the cost between the two and claim the lesser.
 - Obtain a quote for the cost of the airfare for the same dates of travel; submit with your receipts.
- ⇒ If you rent a car, you can submit the rental and the gas receipts for reimbursement.
 - Rental Car collision insurance is a reimbursable expense. However, SJSU only (auxiliaries do not require this) requires that your car rental reservation be made by Fell Travel, otherwise they will not reimburse the cost of insurance.
- ⇒ If you use a personal car only the mileage rate in effect for that year will apply for reimbursement.
 - Mileage rate for SJSU reimbursed travel is 53.5 cents a mile.
 - Research Foundation—Mileage rate is 54 cents a mile.
 - Research Foundation—requires you to have on file an *Authorization to Use Privately Owned Vehicle* form.

Expenses Reimbursed Before Travel

- ⇒ Airline tickets, conference registration, and lodging may be reimbursed before the trip if paid in advance. (*Research Foundation only*).

Personal Time

SJSU requires all staff/faculty to report the use of vacation/sick/personal holiday use. Please note, in general, academic year faculty do not accrue vacation time.

Travel during official breaks i.e. spring break and intersession have different rules for faculty. So please don't hesitate to ask if you are not sure if you need to include that information or not.

POLICY: REPORTING PERSONAL TIME

If you use personal leave while on official university travel the number of personal days must be stated and match your absence reporting for that month (*these are the extra days extended/added aside from your University approved travel dates*). If you have questions about vacation vs. sick time accrual, personal holiday use feel free to contact the department office for help.

POLICY: RECEIPTS

Receipt for airfare, conference registration, etc. and payment method must match (applies to credit cards mostly, but also if using PayPal account or other digital forms of payment.)

In addition, receipts must be in the name of the faculty member authorized to travel.

Important Travel Links:

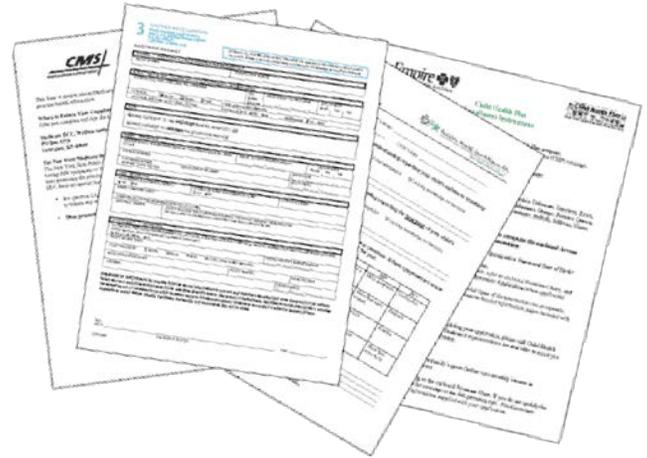
To SJSU Travel, Research Foundation, and Tower Foundation

Travel Authorization: FTS

Your first step towards gaining travel authorization involves using the Financial Transaction Services (FTS) online system.

If this is your first time using FTS or you need a refresher the [tutorial](#) is a helpful guide.

Research Foundation also provides a [tutorial](#) that is specific to travelers requesting a FTS approval and reimbursement from funds managed by this auxiliary.



Travel Reimbursement

If your reimbursement is coming from SJSU/CSU funds this [tutorial](#) on how to use the Financial Transaction Services online process will provide the information you need.

Research Foundation has a pdf of their travel claim [form](#) for completing the reimbursement request.

Tower Foundation also has its own travel claim [form](#) to fill out if the funds are in a Tower Foundation account.

Travel Guides/Policy

If you have a question regarding an allowable expense or want to know the policy on specific aspects of travel, the following guides will help you answer your questions.

[SJSU Travel Guide](#)

[Research Foundation Travel Policy](#)

[Tower Foundation Policy](#)

Other Useful Links

[Fell Travel: SJSU Reservation Online Form](#) (official SJSU travel agency)

[Corporate Traveler](#) (Research Foundation Preferred Travel Agency-Direct bill service)

[Authorization to use privately owned vehicles](#) (Research Foundation only)

[Per Diem rate](#)-for travel within continental U.S.

[Per Diem rate](#)- for travel outside continental U.S. i.e. Alaska, Hawaii, US Possessions and Territories

[Per Diem rate](#)-for foreign travel

Check list for Travel Authorization Process

To Do:

- ✓ Use FTS to submit travel authorization.
- ✓ Upload presentation confirmation letter/email.
- ✓ Include the name of organization/University/conference you will be traveling to.
- ✓ Include funding source e.g. RSCA, grant, other university, etc. Upload email/letter with funding information.
- ✓ Monitor approvals.

*****Failure to do any of these steps may result in delays or non-approval.**



Travel Funds At A Glance

<i>Action Required</i>	<i>San Jose State University</i>	<i>Research Foundation</i>	<i>Tower Foundation</i>
Pre-Authorization required before travel	✓	✓	✓
Can prepay registration with GoCard	✓		
Can prepay registration via a requisition		✓	✓
Can prepay/reserve hotel with Go Card	✓		
Utilizes online travel claim via FTS	✓		
Requires paper travel claim submission		✓	✓
Requires 2-step travel authorization		✓	
Set a \$275.00 per night lodging limit	✓		
Allows per Diem for meals and lodging		✓	

Good Luck and Safe Travels!

Trip Information

* Departure Date

* Return Date

* Destination Country

State

City

* Purpose of Trip

- * Travel Type
- Business Related
 - Team Travel
 - Field Supervision Travel
 - Travel Paid By Non-University Funds

Additional Trip Details

All requests for international travel must be submitted at least 30 days in advance; 45 days for countries considered high hazard.

Always include the name of the conference, workshop, etc. you are attending or presenting at.

If your trip is going to be funded by a third party or with auxiliary funds, choose this button.

Use this area to let approvers know how your trip is going to be funded. Do not forget to provide Research or Tower Foundation account/funding amount.

Travel funds transferred to MAS by another department/division e.g. RSCA, will require that you contact Erlinda for the information you need to fill this in.

This space is also where you would provide other pertinent information or to note any special circumstances.

Funding Source/Chartfields

Line #	* Account	* Fund	* DeptID	Program	Class	Project	* Amount	Percentage
1	<input type="text"/>	0.00	<input type="text"/> ▲ + -					
	<input type="text"/>							

Attach any information you have confirming acceptance of presentation and/or grant award letters providing funding or account information.