



SAN JOSÉ STATE UNIVERSITY

Travel Guide

Effective for all travel conducted as of October 1, 2011

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Introduction

Effective for all travel conducted as of April 1, 2011.

This Travel Guide is intended to inform campus personnel of travel procedures and to guide users in the proper preparation of travel documents. The Travel Guide incorporates State of California, CSU Board of Trustees and SJSU procedures and allowances for travel. The information provided in this document apply to all SJSU employees, students, and others traveling on all official University business where the University will be paying for the travel using University funds, both operating and trust. This policy does not apply to travel paid from auxiliary funds. For specific information on special circumstances that is not addressed in this document please refer to the [CSU Travel Procedures](#). If you have any questions or comments please feel free to contact the appropriate campus [Travel Specialist](#).

Official University Travel Agency

The University requests that travelers only use the following travel agency when travel is being paid or reimbursed with University funds:

Travel Consultants (800) 558-9796 or (408) 228-4416

www.travelcons.com

There is a processing fee of \$15.00 charged for all booking handled by the Official University travel Agency.

As a management arrangement exists between this firm and the University, it is requested that travelers not use any other agencies when arranging their travel. If travelers choose to use another agency, the cost of airfare and ticket processing fee (maximum \$15.00) will be reimbursed.

Authorization to Travel

Domestic ***In-State*** Travel must be approved in advance of making non-cancellable travel arrangements by the traveler's Approving Official and Assistant Vice President or Associate Vice President except in the case of Academic Affairs, where Deans are the highest level required. Domestic ***Out-of-State*** Travel must be approved in advance of making non-cancellable travel arrangements by the traveler's Approving Official and Vice President, except in the case of Academic Affairs, where Deans are the highest level required.

International travel requires the same approvals as domestic travel and the additional approval of the President; International travel for the Academic Affairs Division requires the approval of the Approving Official, Dean, Provost, and President or his/her designee. An Approving Official is defined as management level staff consisting of MPP level employees and department chairs. For further information regarding Approving Officials and delegation of authority, please see the [Delegation of Authority for the Approval of Financial Expenditures Guidelines](#).

Approval Type	Type of Travel	Approval Process	Level of Approval
Request for Approval of Travel	Domestic In-State	Paper form to be approved in advance of making travel arrangements	Approving Official and Assistant Vice President or Associate Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	Domestic Out-of-State	Paper form to be approved in advance of making travel arrangements	Approving Official and Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	International	Paper form to be approved in advance of making travel arrangements	Approving Official, Vice President, and President (for Academic Affairs: Approving Official, Dean, Provost, and President or his/her designee)
Travel Reimbursement Requests	Domestic and International	Submitted through Financial Transaction Services, manual review and signature required	Approving Official

Responsibilities

Traveler Responsibility

Individuals traveling on official University business must familiarize themselves with and adhere to the SJSU Travel Policy. Travelers must obtain documented authorization to travel prior to embarking on the trip and/or prior to making non-cancellable travel arrangements. This authorization is obtained by completing a [Request for Approval of Travel](#) form. Travelers should make certain that the business related expenses they incur are ordinary, reasonable, not extravagant, and necessary to the purpose of the trip.

The traveler is responsible for:

- Submitting travel reimbursement request within 30 days from the return of the trip.
- Providing the business purpose and inclusive dates of each trip.
- Certifying that he/she:
 - Received authorization to travel.
 - Traveled on official University business.
 - Actually spent the amount listed for expenses.
 - Has verified that the amount due is accurate.
 - Obtain detailed/itemized receipts for all expenses incurred.
- Returning to the University within 30 days, any reimbursement or payment issued by the University which subsequently results in a refund to the individual.

Approving Official Responsibility

The Approving Official is responsible for approving travel reimbursements, ensuring all expenses are reasonable in the terms of price, purpose, and necessity.

The Approving Official is responsible for:

- Approving release time for travel.
- Ensuring expenses charged to his/her accounts are supported by sufficient funds and ensuring appropriate use of funds.
- Verifying expenses requested are ordinary, reasonable, not extravagant, necessary, and supported by a business purpose or justification, as appropriate.
- Validating, to the extent possible, that the expenses listed were actually incurred by the employee and that appropriate supporting documentation is included with the reimbursement request.

- Reviewing and approving the business purpose and ensuring the request is in compliance with any applicable sponsored project/grant requirements.
- Approving/denying payment of the travel reimbursement request in a timely manner.
- Denying expenses not directly related to official University business.

SJSU Travel Specialists

The SJSU Travel Specialists are responsible for the following functions:

- Review/audit travel reimbursement requests for compliance with campus and CSU policy.
- Verify Approving Official.
- Ensure appropriate documentation is submitted.
- Process reimbursements in a timely manner when all appropriate documentation is received.

Subsistence Expenses

For purposes of determining the applicability of this section, an official University business trip begins when the traveler leaves his/her residence or normal work location, whichever occurs last, and ends when the traveler returns to his/her residence or normal work location, whichever occurs first. Subsistence expenses for travel within 25 miles of an employee's headquarters or residence shall not be reimbursed.

Subsistence expenses incurred while on travel status consist of charges for lodging, meals and incidental expenses. Incidentals includes fees and tips given to porters, baggage carriers, bellhops, hotel housekeepers, stewards or stewardesses and others in ships, and hotel servants in foreign countries; transportation between places of lodging or business and places where meals are taken, if suitable meals cannot be obtained at the temporary duty site; and the mailing cost associated with filing travel expense claims and payment of employer-sponsored charge card billings.

Expenses reimbursed must be ordinary, reasonable, not extravagant, and necessary to accomplish the official business purpose of the trip. Only expenses actually incurred and substantiated are reimbursable. To be eligible for reimbursement, actual expenses must be documented as outlined in the [Documentation Requirements](#) section of this guide.

If the traveler is unable to provide a required receipt, they must include a statement with the Travel Reimbursement explaining why a receipt is not available.

No expenses for meals or incidentals will be reimbursed for travel of less than 24 hours.

Lodging

Travelers may secure lodging when traveling on business more than 25 miles (one way) from their normal work location or home, whichever is closer. Lodging expenses must not be extravagant and should be reasonable for the locality of travel. For information regarding international lodging refer to the [International Travel](#) section of this document.

State and Government Rates

When making lodging reservations, travelers should inquire if hotel/motel has reduced rates for state and/or government entities. Should identification be requested, a University issued Tower (ID) Card or American Express Government Card should be sufficient.

California City and County Transient Occupancy Taxes Exemption

Employees traveling overnight in California on official State business are sometimes exempt from paying Hotel/Motel Transient Occupancy Taxes. When checking in, provide the hotel or motel with a [Hotel/Motel Transient Occupancy Tax Waiver](#) and request an exemption certificate. Many hotel/motel chains have their own form. A University issued Tower (ID) Card or American Express Government Card should be sufficient for the waiver. Some establishments do not grant the tax waiver.

Use of Non-Commercial Facilities

When non-commercial facilities such as cabins, house trailers, vans, field camping equipment, or other such facilities are used, the traveler shall be reimbursed a daily amount based on actual expenses up to 100% of the applicable federal per diem lodging rate for the appropriate geographic area (see <http://www.gsa.gov/portal/category/21287>).

Lodging with a Friend or Relative

When a traveler lodges with a friend or relative while on official business for the University, a one-time non-cash gift, such as flowers, groceries, or a restaurant meal, may be provided to the host. The type of gift provided should be in compliance with the use rules surrounding the funds used for reimbursement. The actual cost of such a gift may be reimbursed up to \$75. A receipt must be provided for all gifts.

Meals While Traveling

The reimbursement of daily meal and incidental expenses for travel within the continental United States will be based on actual amounts incurred up to \$55 a day. Expenditures above the cap are the responsibility of the traveler unless a documented exception is approved. Any individual meal costing \$25.00 or more must be supported by a detailed receipt.

Alcoholic beverages are not reimbursable. If an alcoholic beverage is found on a travel reimbursement as a meal expense, the amount will be deducted from the meal, even if the meal amount falls within daily limit rate.

Reimbursement procedures relating to travel outside the continental United States can be found at <http://www.gsa.gov/portal/category/21287>.

Meals Provided as Part of the Event

In the event the traveler must forego the provided meal for health or business reasons, an explanation for the purchase of the meal replacement must accompany the reimbursement. Supporting documentation may be requested and required.

Hospitality Meals

Expenses for meals incurred by employees who provided hospitality while traveling on University business are reimbursable in accordance with SJSU Hospitality Guidelines

Incidental Expenses

Incidental expenses for travel within the continental United States will be based on actual amounts incurred up to a maximum of \$7 a day. Examples of incidental expenses include fees and tips given to porters, baggage carriers, bellhops, stewards or stewardesses and others on ships, and hotel staff in foreign countries; transportation between places of lodging or business and places where meals are taken, if suitable meals cannot be obtained at the temporary duty site. It does not include cab fares, telegrams, or telephone calls.

Miscellaneous Expenses

Miscellaneous expenses are reimbursable when they are ordinary and necessary to accomplish the official business purpose of a trip. Miscellaneous expenses include, but are not limited to: charges for business phone calls and telegrams; fax and computer expenses; and copy services. Justification must be provided for all miscellaneous expenses.

Travel of Less Than 24 Hours

When the entire length of a trip is less than 24 hours, meals and incidental expenses shall not be reimbursed unless the travel includes an "overnight stay" as supported by a lodging receipt.

For a trip of less than 24 hours within the continental U.S. which includes an overnight stay, reimbursement shall be authorized for the actual cost of lodging, meals and incidental expenses subject

to the daily maximum amount set forth in Appendix B for Travel of Less Than 30 Days. The maximum meal reimbursement of \$55.00 for a single day shall be authorized for the entire trip, even if the trip takes place over two consecutive workdays.

Overnight Stay Exception

- If an exception to the overnight-stay requirement is allowed by the Approving Official, the actual expense, with supporting detailed receipts, of the meal(s) reimbursed is reported to Payroll and becomes reportable and taxable. Under no circumstances will expenses for lunch be reimbursed for travel of less than 24 hours; only breakfast up to \$10.00 and dinner up to \$25.00 are reimbursable.

Documentation Requirements

Original detailed/itemized receipts must be submitted for **all** travel related expenses listed below when requesting reimbursement. If an original receipt is lost, a duplicate or proof of payment (e.g., copy of check, bank or credit card statement) must be obtained in order to process the travel reimbursement.

- Lodging
- Airfare
- Rental Car
- Expenses over \$25.00, including meals
- Miscellaneous Expenses

Travel Advances

Travel advances are available only for international, extended domestic, or team travel. Conference fees should be paid by [Accounts Payable](#) directly to the conference. (For more information, see Attendance at Conventions, Conferences, or Business Meetings). Exceptions for emergency situations will be evaluated on a case-by-case basis.

A traveler or group leader with an advance in delinquent status will not be allowed to receive any additional travel advances for subsequent trips. A travel advance is considered delinquent if a travel reimbursement request has not been received by the Travel Specialist within 30 days of the completion of travel.

Additionally, any travel advance that is deemed delinquent is subject to collection via deduction from the employee's pay warrant. Employees who have an advance deducted from their pay warrant will no longer be eligible for travel advances.

Transportation

Transportation expenses consist of charges for commercial carriers, private car mileage allowances, overnight and day parking of State or privately-owned cars, rental cars, gas for rental cars, necessary taxi, bus, rapid transit fares, bridge and road tolls, and other charges essential to the transport to and from SJSU.

Reimbursement of transportation expenses will be based on the most economical method of transportation and the most commonly traveled route consistent with the authorized purpose of the trip. If the mode of transportation selected does not conflict with the needs of the campus, the employee may use a more expensive form of transportation and be reimbursed at the amount required for a less expensive mode of travel. Both modes of transportation must be shown on the travel reimbursement request.

Expenses arising from travel between an employee's home and the University will not be allowed. In the instance where a trip commences or terminates at the traveler's home, the distance traveled will be calculated from either the traveler's home or the University, whichever results in a lesser distance. Exceptions to the above are:

- Where such expenses are incurred by call back for overtime work necessitating more than one trip to the work location on a normal work day or by any call back on an employee's normal day off.
- When travel to or from a common carrier commences or terminates before or after the regularly scheduled work day or on a regularly scheduled day off, the distance may be computed from the traveler's residence.

Airline Travel

Transportation by scheduled airlines shall be allowed at the lowest fare available at time of booking.

Purchasing Tickets

- **Purchasing Airline Tickets through Official University Travel Agency:** Making reservations through the official University travel agency Travel Consultants, is the preferred method of booking. Doing so alleviates the financial burden on the traveler and places it on the University.
- **Purchasing Airline Tickets through an Internet Service:** The use of the Internet to secure cheap airline tickets has become more and more prevalent, but there are significant risk factors to consider before purchasing a ticket in this manner. If purchasing such tickets make certain that nothing will prevent you from taking the scheduled flight(s). When tickets are purchased in this manner, the traveler assumes all financial responsibility. Should the trip be cancelled, the University will not reimburse for tickets purchased.

Official University Travel Agency
Travel Consultants (800) 558-9796 or (415) 558-9796
www.travelcons.com

Rail or Bus Transportation

Rail or bus transportation may be used when required by the destination or by business necessity.

Reimbursement for roomette Pullman accommodations will be allowed. If more expensive accommodations are used, the traveler must justify the expense in a written explanation submitted with the travel reimbursement request.

Unused portions of railroad and sleeping car tickets are subject to refunds and all steps necessary to secure refunds on such tickets shall be taken.

Rental Cars

A vehicle may be rented when renting would be more advantageous to the University than other means of commercial transportation. Advance reservations should be made through Travel Consultants whenever possible and a compact, economy, or intermediate vehicle should be requested. These classes should be used unless a no cost upgrade is provided. By using the official University travel agency, charges will be directly billed to the University and the traveler will incur no out-of-pocket expense.

The primary approved car rental agency for all travel is Enterprise Rent-A-Car. In the event that the primary vendor is unable to provide service, the secondary vendor, Enterprise Holdings, Inc. (National Rental US) must be used. Employees must rent cars from the approved state car rental agency in order to have auto liability insurance coverage sponsored by the University. In order to rent a vehicle under the state contract, the traveler must be identified as a state employee and have a valid driver's license.

Travelers are **strongly encouraged** to return vehicles with a full tank of gas prior to dropping off the vehicle. Gas **should not** be purchased through the rental car agencies due to increased cost and additional fees that may be applicable.

Official Contracted Car Rental Companies: Enterprise Rent-A-Car is the primary vendor for all state approved travel. The list below includes maximum daily rates for compact vehicles and the corporation discount identification number.

Contractor	Enterprise Rent-A-Car	Enterprise Holdings, Inc.
		National Rental US
Base Rate	\$30.00	\$30.00
Max Rate	\$46.00	\$46.00
Reservation Phone	(866) 788-7053	(800) 227-7321
Corporate ID	Contact University Travel Specialist	Contact University Travel Specialist

Special Vehicles: When it is necessary to rent special vehicles (i.e. trucks), a full explanation must accompany the Travel Expense Claim. The traveler should check with Facilities Development and Operations as to the availability of State trucks before renting from outside agencies.

Special Vehicles with Hand Controls: State employees requiring vehicles with hand controls are free to make their own arrangements.

Transportation by Privately Owned Vehicles

Employees authorized to use a privately-owned vehicle to conduct official business must meet the following requirements:

- [Authorization to Use Privately-Owned Vehicles on State Business \(Std Form 261\)](#) must be on file with the supervisor who has approved the travel. By signing this form, you are acknowledging that you have insurance. When using your own car, your own private car insurance is the primary coverage. The University's liability coverage will only apply after the limits of your own coverage are reached.
- The vehicle must be covered by liability/collision insurance.
- The vehicle must be in safe mechanical condition and be equipped with safety belts in operating condition.
- If an employee uses their own vehicle for State business more than once a month, the employee must have satisfactorily completed a defensive driving course that is offered on campus.

Reimbursement for use of a privately-owned automobile will be allowed for the driver of the vehicle only. Where use of a privately-owned automobile is authorized for travel to or from a common carrier terminal and the automobile is not parked at the terminal during the period of absence, then a request may be filed for reimbursement. The current mileage reimbursement rate may be claimed only while the employee is an occupant of the vehicle for the distance between the terminal and the employee's residence or headquarters, whichever is less. If the employee commences or terminates travel after the regularly scheduled work day or on a regularly scheduled day off, mileage may be computed from the employee's residence.

Expenses arising from travel between home or garage and the University shall not be allowed. Where a trip is commenced or terminated at claimant's home, the distance traveled shall be computed from either the employee's office or home, whichever shall result in the lesser distance.

When claiming private automobile mileage, the automobile license plate number must be stated on the Travel Reimbursement Request.

As of January 1, 2010, the current rate of reimbursement for mileage is \$0.50 per mile.

Defensive Driving Course/Card

All employees authorized to use private vehicles to conduct University business must have satisfactorily completed a CSU approved defensive driving course and have in their possession a valid Defensive Driving Card issued by University Risk & Compliance Office. Defensive driving courses are offered on campus at least twice each year. In addition, on-line courses are available. To register for defensive driving courses, contact [University Risk & Compliance](#) at 924-2155. If an employee has not completed such a course, a non-renewable, temporary permit to drive a vehicle can be issued (the card will only be valid until the next course is offered).

For more information regarding defensive driving courses and temporary Defensive Driving Cards contact [University Risk & Compliance](#) at 924-2150 or 924-2155.

Privately Maintained Liability/Collision Insurance

Employees authorized to use a privately owned vehicle to conduct official State business must complete [Authorization to Use Privately Owned Vehicles on State Business \(Std form 261\)](#), certifying the vehicle used will always be covered by liability insurance for the minimum amount prescribed by law and that other safety factors are in effect. This form should be retained by the supervisor who has the responsibility for approving the use of privately-owned vehicles. Authorization forms are valid for a period not to exceed one year. Once completed, this form must be verified, resigned and dated annually by the employee to certify that it is current. In addition, employees must comply with the law (Vehicle Code Section 16028) that requires motorists to have evidence of vehicle insurance in their possession.

Each person who plans to drive a privately owned vehicle should be aware that coverage must be provided by his/her insurance rather than through any State sponsored insurance program. Insurance maintained by the State is only applicable to claims over and above the liability insurance maintained by the individual.

The normal practice of insurance carriers is to allow the occasional use of privately owned vehicles on business trips without an increase in premium rates. If the privately owned vehicle is used consistently on state business, the employee should contact his/her insurance carrier who may change the premium class.

The rates of reimbursement for mileage set out in the travel procedures include the cost of maintaining liability insurance at the minimum amount prescribed by law as well as collision insurance sufficient to cover the reasonable value of the vehicle, less a standard deductible.

When a privately owned vehicle operated by an employee is damaged by collision or receives other accidental damage, reasonable reimbursement for repair shall be allowed under the following conditions:

- The damage occurred while the vehicle was being used on official State business with the permission or authorization of the employing campus.
- The vehicle was damaged through no fault of the employee.
- The amount claimed is an actual loss to the employee, which is not recoverable either directly from or through the insurance coverage of any of the parties involved in the accident. The insurance companies of the parties involved are primarily responsible for reimbursement for damages, rather than the State of California.
- The amount of the loss claimed does not result from a decision of an employee not to maintain collision coverage.
- The claim is processed in accordance with prescribed procedures set forth in the State Administrative Manual.

Motor Vehicle Accident Reporting

San José State University is self-insured for its motor vehicle liability insurance through a program administered by the State of California Office of Risk & Insurance Management (ORIM) at the California Department of General Services.

Whenever a State-owned vehicle, privately owned vehicle, or rental car driven on State business is involved in an accident, the driver of the vehicle must complete a [Vehicle Accident Report \(Std. Form 270\)](#) within 48 hours and submit the form to:

**San José State University
University Risk and Compliance Office
One Washington Square
San José, CA 95192-0046
Fax: (408) 924-2148**

The immediate supervisor who authorized or permitted the employee to use the vehicle will ensure that the employee completes the Std. Form 270 or, should the employee be unable to do so, the supervisor will complete it for the employee. Be sure to keep a copy for your internal records.

In all vehicle accidents that result in injury or serious damage, immediately telephone ORIM at (916) 376-5302. If no answer, leave a message where you can be reached on the next business day. Submit a [Vehicle Accident Report \(Std form 270\)](#) within 48 hours. Advance copies of accident reports may also be sent to ORIM by fax at (916) 376-5277.

To report new accidents involving serious injury after normal working hours, on weekends, or holidays, call (916) 322-8967 and leave a message. You will be contacted on the next business day for more details.

ORIM has approved a new contract for providing additional accident investigation and adjusting services. Representatives of Southland Claims may contact employees for additional information regarding an accident. University employees, who are contacted by an adjuster from Southland Claims, may verify that the adjuster has been retained by the State by calling ORIM at (916) 322-0459.

Additional policy information pertaining to motor vehicle accidents is outlined in the CSU Use of University and Private Vehicles Policy Guideline.

For more information about SJSU driving requirements and to obtain required forms for both University and Private vehicles, visit [SJSU Human Resources University Risk & Compliance](#).

Travel Reimbursement Request

Processing and Reimbursement Time Frames

Once the traveler has submitted the Travel Reimbursement Request with all correct and verifiable supporting documentation and appropriate approvals, the Travel Specialist will audit it for compliance with University and CSU policies. Complete Travel Reimbursement Requests are generally processed within ten (10) business days of receipt.

Settlement of Advances

If funds for international travel were advanced to the traveler, this advance must be cleared by submitting a Travel Reimbursement Request. If the traveler did not spend the full amount of the advance, a personal check for the balance due, made payable to SJSU, must be stapled to the front of the reimbursement request.

If the traveler does not clear the advance within 30 days of the trip, the Travel Specialist will send a first reminder. If the completed claim and documentation is not submitted to the Travel Specialist within 10 days, the advance will be deducted from the traveler's payroll check as authorized by the traveler on the [Request for Approval of Travel](#) form. If this action is necessary, the privilege of receiving advances will be revoked.

Travel Reimbursement Request Instructions

Within 30 days of trip completion, the traveler must submit a Travel Reimbursement Request, and all original receipts to the Travel Specialist. The form must have the original signatures of the traveler and the Approving Official as outlined in [Authorization to Travel](#). A Travel Reimbursement Request is required for all trips in which an expense was incurred in connection of University travel, whether the expense was paid directly by the University or the traveler.

Special Travel

Accreditation Team Member Travel Expenses

Payments to accreditation team members for travel expenses incurred for on-campus visits must be coordinated and approved by the Associate Vice President of Undergraduate Studies (AVP/UG) prior to the visit. Payment is limited to actual expenses incurred for transportation, lodging and meals per the policy set forth in this guide.

The department must submit a Travel reimbursement request with proper receipts attached, signed by the accreditation team member and the Approving Official. Under this procedure, accreditation team members will receive reimbursement through the mail after the visit.

Recruitment Travel Expenses-Faculty and Staff Applicants

Payments to applicants and their spouses or domestic partners for travel expenses incurred for on-campus interviews must be cleared and approved by the Approving Official. Payment is limited to policies set forth by SJSU in this document.

Meals for Applicants: Meals will be reimbursed as set forth in this document. An applicant and his/her spouse or domestic partner may be reimbursed for meals not provided by the department or University. University personnel who incur the cost of meals for an applicant may request reimbursement for the expense as outlined in the Meal Reimbursement section of this document. Under State regulations, meal reimbursement is allowed for the applicant and their spouse or domestic partner only.

Reimbursement of Travel Expenses: Applicants' travel expenses which are not prepaid will be reimbursed through a Travel Reimbursement Request. The department must submit a Travel Reimbursement Expense with the proper receipts attached, signed by the applicant and Approving Official. Under this procedure the applicant will receive reimbursement through the mail.

Travel Expenses for Handicapped Applicants: If any applicant called for an interview has a physical handicap requiring a traveling companion, the companion may be reimbursed for travel and subsistence expenses under the rules applicable to the candidate.

Student Teacher Field Supervisors

In their roles as Student Teacher Field Supervisors, faculty will be reimbursed in accordance with the Memorandum of Understanding between the California Faculty Association and the CSU. For details please see the [MOU CalState TEACH](#).

International Travel

International travel requires approval from the President or his/her designee in addition to that of the Vice President/designee and Approving Official. International travel to areas on the State Department's Travel Warning list requires prior written approval from the Chancellor or appropriate designee.

Travelers to foreign destinations will receive a fixed amount for lodging, meals and incidentals in accordance with the [Federal Maximum Travel Per Diem Allowances for Foreign Areas](#) published by the U.S. Department of Defense. Detailed, itemized receipts for expenses greater than \$25.00 must be included with the Reimbursement Request.

If actual expenses claimed are greater than the rates outlined in Federal [Maximum Travel Per Diem Allowances to Foreign Areas](#), the traveler must submit a written explanation with the Travel Reimbursement Request.

When staying in one location for 30 or more consecutive days but less than one year, the traveler is expected to seek long-term accommodations.

Taxability of International Travel with Personal Use

International travel frequently consists of both business and personal components. According to the IRS, there is a taxable event if BOTH of the following conditions are met:

- The total period of the trip is longer than one week, *and*
- At least 25% of the trip is personal

In the event that both conditions are met, a portion of the common business expenses that are incurred by the traveler, including airfare, is taxable to the traveler. This requirement applies only to travel outside the 50 United States and the District of Columbia. When a travel day consists of both business and personal time, the day will be classified as a business day in order to determine the percentage of personal time associated with the trip.

Travel associated with sabbaticals will be treated as official University business.

Special Fees for International Travel

Travelers may be reimbursed for unique costs associated with international travel such as: the actual cost of obtaining a visa, tourist card and related affidavits; charges for currency conversion, ATM and check cashing fees outside the U.S.; the cost of traveler's checks; costs related to hiring guides, and translators; and the cost of collision insurance on automobiles rented.

Moving Regulations

Definitions

Employee: Either a current CSU employee or an individual who has formally accepted an authorized offer of employment within the CSU system.

Household Goods: Personal effects and items used, or to be used, in the employee's residence necessary for the maintenance of a household.

If Employment Terminated within Two Years

If an employee's moving and relocation expenses have been reimbursed, and he/she does not continue his/her employment with the University for a period of at least two years, the employee shall repay the University the following percentage of the reimbursement amount:

Percentage of Total Cost	Employment Time Period
100% of total cost	Employed less than six months
75% of total cost	Employed at least six months, but less than 12 months
50% of total cost	Employed at least 12 months, but less than 18 months
25% of total cost	Employed at least 18 months, but less than 24 months

Employees whose discontinuance of University employment was the result of death, disability, or similar unexpected cause beyond the control of the employee as determined by the appointing authority, are exempt from this repayment policy.

Moving and Relocating Reimbursements

The CSU has no contractual arrangement for moving the employee's household goods. The employee must negotiate a personal contract with a mover.

Full or partial reimbursement may be allowed for the actual and necessary expenses incurred for packing, insurance, transportation, storage in transit (not to exceed 60 calendar days), and unpacking and installation of the employee's household goods at the new residence, when properly documented by invoices and receipts. Should the employee move himself/herself, reimbursement for such moves may not exceed the cost that would have been incurred had he/she used a commercial moving firm.

An employee and spouse or domestic partner may be reimbursed for travel expenses incurred in relocating. Travel expenses include lodging, meal allowances, incidental allowances for every complete 24 hour period, and mileage traveled. The following limits apply:

Meals	\$55.00 per day per person
Incidental Allowance	\$7.00 per person for each 24 hour period
Mileage	\$0.19 per mile

Procedures for Payment of Moving Reimbursements

Receipts and invoices verifying the actual costs of a move should be submitted via a [Travel Reimbursement Voucher](#) in the [Financial Transaction Services](#). Also include a letter stating the date of hire and total amount to be reimbursed. The University will reimburse the employee upon receipt of this form or pay the commercial moving company directly if you submit a [Web Requisition](#). Your web requisition should include all move information and an estimate of moving expenses.

Reportable and Taxable Expenses

Please note that portions of moving expenses are considered taxable income. Taxable expenses include:

- All meals connected with the move
- Pre-move house hunting trips
- Temporary living expenses
- Mileage reimbursement in excess of \$0.24 cents per mile
- Rental car

If any of these expenses are reimbursed on a moving expense reimbursement, they will be reported to Payroll. Contact [Payroll](#) to determine how this will be reflected on your pay warrant.

University Credit Cards

SJSU American Express Card Program

The American Express Government card is offered to all permanent employees. The government card is available at no annual fee to the individual. Cardholders will receive several travel benefits with the use of their card, including; \$200,000 of Business Travel Insurance and Baggage Insurance. Coverage is subject to the terms, conditions, and exclusions of the Policy and covers baggage when traveling on licensed common carriers.

1. **Uses:** The American Express Government card is to be used for San José State University travel expenses. It should be used to charge all lodging, meals, car rentals, and other University travel related expenses.. All authorized car rental agencies will accept the SJSU Government Card. Contact [American Express](#) for more information.
2. **Applying for the Card:** Use the [American Express Government Card Application](#) form. Both new and renewal cards will be mailed directly to your billing address. Questions concerning the application for and the issuing of cards should be addressed to Procurement & Support Services at 924-1560.
3. **Liability:** The University is not liable for charges made on your individual American Express Government Card. Charges will be billed directly and be payable by the cardholder. The University will reimburse the traveler after the Travel Specialist receives your completed and approved Travel Reimbursement Request. **Payment Terms:** Charges are due and payable immediately upon receipt of your bill. **Lost or Stolen Cards:** Cardholders should immediately notify American Express at (800) 528-2122 if their card is lost or stolen. A replacement card will be mailed to the cardholder's address upon receipt of proper documentation. Cardholders will not be liable for charges arising from any unauthorized use of the government card if the cardholder notifies American Express immediately.

Appendix A

Definitions

For the purpose of these procedures, the following definitions will apply:

Approving Official: Management level staff consisting of MPP level employees and department chairs who have been delegated authority for the approval of financial expenditures.

Employee: Refers to all officers, administrators, faculty, and staff of SJSU, both full and part-time, including volunteer employees.

Headquarters: Headquarters for each employee is defined as the place where the employee spends the largest portion of regular work days or working time, or the place to which the employee returns on completion of special assignments, or as the Chancellor's Office may define in special situations. Where an office building or similar definite place constitutes the employee's headquarters, no hotel or daily per diem expenses are allowed at any location within 25 miles of the headquarters. In cases where adherence to the 25-mile limitation creates an unusual and unavoidable hardship to the employee, exceptions may be granted by the President.

Incidental Expenses: The incidental expenses portion of the federal per diem rate includes fees and tips given to porters, baggage carriers, bellhops, stewards or stewardesses and others on ships, and hotel staff in foreign countries; transportation between places of lodging or business and places where meals are taken, if suitable meals cannot be obtained at the temporary duty site; and mailing costs associated with filing travel claims and payment of University-sponsored charge card billings.

Lodging: Expenses for overnight sleeping facilities. Does not include accommodations on airplanes, trains, buses, or ships which are included in the cost of transportation.

Meals and Incidental Expenses Reimbursement Cap: The maximum amount authorized for reimbursement of actual daily meal and incidental expenses for travel within the continental United States. Travelers may only seek reimbursement for their actual expenses up to the cap amount. This reimbursement cap *shall not be treated as a per diem*. For purposes of the reimbursement cap, incidental expenses include tips and fees for services, e.g., for waiters, baggage handlers, etc.

Official University Business Travel: to be considered Official University Business Travel at least one of the following criteria must apply:

- A trip is certified by the President or designees to be essential to University operations;
- The trip relates directly to University programs including professional development activities and objectives;

- The trip is to a meeting of a professional association or society to deliver a paper, to serve as moderator or group leader, to serve on a panel, or to fulfill obligations as an association or society officer; or
- The trip has as its primary purpose recruitment of faculty or administrative personnel.

President: The President of SJSU or his/her designees.

Receipt: A detailed/itemized written acknowledgment of money received, obtained from the place of purchase. For substantiation of an expense, a receipt indicates what was purchased, the amount due, the form of payment and preferably a zero balance. Credit card slips and credit card statements are not considered receipts.

Residence: A place of primary dwelling shall be designated for each employee. A primary dwelling is defined as the actual dwelling place of the employee. Per Diem or other subsistence expenses will not be reimbursed if incurred at an employee's residence.

Subsistence Expenses: Expenses such as (1) Lodging, including taxes and service charges; (2) Meals, including taxes and tips; and (3) Incidental expenses (see Incidental expenses above).

Appendix B

Travel Forms

Note: Forms require the free [Adobe Acrobat Reader](#) for viewing.

[AMEX Government Card Application](#): A credit card for frequent travelers.

[Authorization to Use Privately Owned Vehicles on State Business \(Std 261\)](#): Any employee that uses a privately owned vehicle to conduct official University business must complete this form. Department supervisors that approved the travel must keep this form on file. Employees must re-sign this form every year.

[Hotel/Motel Transient Occupancy Tax Waiver Exemption Certificate](#): To waive hotel/motel Transient Occupancy Tax. You can obtain this form by contacting the Travel Desk at 924-1572.

[Registration Payment Request](#): For conference, workshop, seminar, and class fees.

[Request for Approval of Travel](#): For travel advance and year-end travel accrual.

[Travel Reimbursement Voucher](#): For travel expense reimbursement.

[Vehicle Accident Report \(Std 270\)](#): The driver must complete this form whenever a State owned vehicle, privately owned vehicle, or rental car driven on State business is involved in an accident

Appendix C

References

[CSU Travel Policy](#)

[SJSU Hospitality Policy](#)