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INTRODUCTION

This reference guide explains requirements for travel by Academic Affairs Division employees.

The travel approval process is now done online, through Financial Transaction Services (FTS). Levels of approval required remain the same. Individuals who cannot log into FTS (such as students or auxiliary employees) must submit a paper Request for Approval of Travel.

For information on allowable expenses and other reimbursement related questions please check the SJSU Travel Guide.
GENERAL TRAVEL INFORMATION

Submitting a Request for Approval of Travel

Approval for travel is required for every trip taken professionally or personally (only if occurring on a duty day – this applies only to Faculty). The request for approval of travel is done online, through FTS.

Submit Request Sufficiently in Advance
Domestic travel requests should be submitted at least 2 weeks in advance of departure date.

International travel authorizations to countries not deemed high hazard must reach the Office of the President at least 30 days in advance of the departure date. It is recommended that international travel requests be submitted at least 45 days in advance in order to meet this deadline. Remember that Canada and Mexico are international.

Destinations deemed high hazard must reach the Office of the President at least 45 days in advance. Please see page 6 for more information on international travel deadlines.

Covering Classes
For faculty who travel on duty days, please be specific about how your classes will be covered. An acceptable alternative teaching/learning experience is required.

Estimating Expenses
When filling out a request for approval of travel, the traveler should be as realistic and accurate as possible. Reimbursements are allowed up to the preapproved amount. This ensures that only the allocated amount is spent on travel and that no deficit is incurred.

Checking Status of Request
You can check the status of your Request for Approval of Travel by searching by trip number or traveler name in FTS.

Cannot log in to FTS
If you are a student or an employee of an auxiliary organization (Research Foundation, Tower Foundation, etc.), and cannot log in to FTS, you must submit a paper Request for Approval of Travel. Please follow all rules and guidelines as set out for FTS users; include hardcopy versions of notes and attachments as instructed in this guide.
Funding
Travel can be supported through many different types of funds (Operating Fund, CERF, Trust, Auxiliary, etc.). However, the reason for the travel must align with the source of support. For example, if CERF funds are used, the travel must be for the support and development of self-support programs. Similarly, travel supported by Trust funds should be consistent with the purpose of the Trust fund.

Vehicle Travel
If you are planning to use a personal or state vehicle for business during travel, you are required to take a defensive driving course and provide certification of completion prior to travel. For more information on defensive driving, please visit the Defensive Driving Program on the Human Resources website. Defensive Driving courses provide certification for 4 years only, and must be renewed when expired.

If employees choose to travel by personal vehicle instead of by flying, they should obtain an airline quote (can be obtained through Travel Consultants) before they travel. This should be attached to the Travel Reimbursement Request and is used to show that the cost of driving was the same or less expensive than flying.

DOMESTIC TRAVEL

Travel Advances
SJSU does not give travel advances to individuals for domestic travel. In special circumstances, advances are given to those who are leading student groups domestically.

Please see the SJSU Travel Guide for more information on travel advances.

Provost Approval
Only two types of domestic travel requests require the Provost’s approval – those in which the traveler is asking for an advance or if the traveler is one of the Provost’s direct reports (Dean/AVP). The Travel Desk requires 30 days notice to process all approved advances. All other domestic travel requests do not require the approval of the Provost.
INTERNATIONAL TRAVEL

Travel Insurance
All university-related international travel must use Foreign Travel Insurance Program (FTIP) insurance. It is the responsibility of the traveler/funding source to cover mandatory insurance costs.

For university-funded travel, FTS will automatically forward the approved travel request to Risk Management in Finance to arrange travel insurance.

If Research or Tower Foundation funding is being used, please specify this in the travel request “Additional Details” box and a copy of the approved travel request will be sent to the appropriate contact to arrange travel insurance.

Submitting Requests Sufficiently in Advance
International travel authorizations to countries not deemed high hazard must reach the Office of the President at least 30 days in advance of the departure date. It is recommended that international travel requests be submitted at least 45 days in advance in order to meet this deadline.

International travel authorizations to high hazard countries must reach the Office of the President at least 45 days before the departure date. This will give 2 weeks to obtain President’s Office approval and Chancellor’s Office and Underwriter approval before the CSU-determined deadline of no less than 30 days prior to the departure date. The traveler must complete and attach the CSU’s High Hazard Foreign Travel Approval Request to their Travel Authorization request in FTS. Please see page 6 for more information on travel to high hazard countries.

Late Travel Requests
If the international travel request is submitted with less than 30 days notice, additional justification as to why the request is late will need to be included. This does not guarantee approval. Only the Office of the President can grant exceptions for late international travel requests.

If the travel destination is a high hazard country, please contact the Chief of Staff in the Office of the President immediately to determine if an exception is possible.
CHECKLIST FOR TRAVEL TO HIGH HAZARD COUNTRIES

Effective March 25, 2013, the Chancellor’s Office mandated new steps regarding international travel requests to high hazard countries. To ensure that all international travel authorizations to high hazard countries are submitted with the necessary paperwork, please complete the following steps:

1. Determine if your international travel destination is considered high risk.

   Is your destination listed on either of the following lists?
   - US Department of State Current Travel Warnings
   - CSU Risk Management’s High Hazardous Country List

   IF YES: You must complete Steps 2 and 3, in addition to completing and submitting your Travel Authorization per the University Travel Guide and Academic Affairs Division Travel Guide (Step 4).

   IF NO: Your travel destination is not currently considered high hazard (Please proceed to STEP 4).

2. Complete the CSU’s High Hazard Foreign Travel Approval Request Form.

   The traveler must complete and upload a copy of the CSU’s High Hazard Foreign Travel Approval Request to their Travel Authorization request in FTS. The President’s signature is not required on this form. However, the upload of this document will be routed through the approval chain in FTS.

3. Submit the Travel Authorization sufficiently in advance.

   Travel Authorizations to high hazard countries must arrive at the Office of the President at least 45 days before the departure date. This will give 2 weeks to obtain President’s Office approval and Chancellor’s Office and Underwriter approval before the CSU-determined deadline of no less than 30 days prior to the departure date.

   If funding is based on an outside entity (i.e., grants or professional organizations), Travel Authorizations can be submitted before funding is secured, in order to meet the necessary 45 day advance deadline.
For those who receive conference or award offers or acceptances too late to meet the advance deadline, please contact the Chief of Staff in the Office of the President immediately to determine if an exception is possible. Only the Office of the President can authorize exceptions.

4. **Travel Authorizations must be completed and submitted per the [University Travel Guide](#) and Academic Affairs Division Travel Guide.**

This includes, but is not limited to:

- International travel authorizations must reach the Office of the President at least 30 days in advance of the departure date. It is recommended that international travel requests be submitted at least 45 days in advance in order to meet this deadline.
- For faculty: If travel occurs during days you would be teaching, you must indicate how classes will be covered.
- All Travel Authorizations must be submitted online through [FTS](#). Travelers who do not have access to the FTS system must fill out the hardcopy [Request for Approval of Travel](#).
- Per CSU Travel Policy, the maximum lodging rate (excluding taxes) for in-state and out-of-state travel cannot exceed $195 per night. If your hotel rate exceeds this amount, you must provide explanation/justification for the higher rate in the “Additional Trip Details” field in the Request for Authorization to Travel form in FTS.
### ACADEMIC AFFAIRS

#### DOMESTIC & INTERNATIONAL TRAVEL APPROVAL PROCESS

<table>
<thead>
<tr>
<th>SJSU Travel Policy</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Approved Travel Request required for travel reimbursement (including trips paid for by Tower or Research Foundation)</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Use CSU Operating Funds (70000)</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Use Trust Fund, Research or Tower Foundation Funds</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Travel insurance required for ALL university-related business travel (either through Risk Management or Research Foundation)</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Complete funding information for travel insurance</td>
<td>NO</td>
<td>YES</td>
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<tr>
<td>Approval required by Chair or Supervisor</td>
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<td>YES</td>
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<tr>
<td>Approval required by Dean or AVP</td>
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</tr>
<tr>
<td>Approval required by Provost</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Approval required by President’s Office</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Approval required by Chancellor’s Office*</td>
<td>NO</td>
<td>VARIES*</td>
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*Countries deemed “High Risk” by CSU or US Department of State

### INTERNATIONAL TRAVEL INSURANCE CONTACT INFORMATION

<table>
<thead>
<tr>
<th>SJSU Funds</th>
<th>Research Foundation Funds</th>
<th>Tower Foundation Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Loftus</td>
<td>Norma Rossiter</td>
<td>Judy Kass</td>
</tr>
<tr>
<td>Risk &amp; Compliance Manager 924-2159</td>
<td>Associate Director, Bus. Services 924-1418</td>
<td>Tower Foundation HR Director 924-1127</td>
</tr>
<tr>
<td><a href="mailto:Mark.Loftus@sjsu.edu">Mark.Loftus@sjsu.edu</a></td>
<td><a href="mailto:Norma.Rossiter@sjsu.edu">Norma.Rossiter@sjsu.edu</a></td>
<td><a href="mailto:Judy.Kass@sjsu.edu">Judy.Kass@sjsu.edu</a></td>
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