Supervision Travel Reimbursement Request Checklist

Go to MySJSU and click on FTS

In FTS you must list the following:

1. Traveler’s University Affiliation:
   - Faculty

2. Travel dates:
   - Departure date (date of first school site visit)
   - Return date (date of last school site visit)

3. Destination:
   - United States
   - California
   - Enter city that most school sites reside in

4. Purpose of Trip:
   - Enter your supervision course and section # (examples: EDEL 143B-03, EDSC 184X-06, MTED 184Y-01)
   - For business meetings, please indicate who you are meeting with.

5. Travel Type:
   - Field Supervision Travel

6. Additional Trip Details:
   - Any additional information you would like to relay.

7. One Time Charges:
   - Skip this section

8. Daily Expense Charges:
   - Skip this section

9. Daily Mileage (click on + to add multiple daily mileage lines):
   - Date (of school site visit)
   - Miles
   - Rate (.545 .58 as of 1/1/19) should automatically populate after miles are entered
   - Amount (should automatically calculate after miles are entered)
   - Between what points was the car driven (and return if round trip)
   - This must be from your home or SJSU, whichever is the shortest distance to the school site, and back (for example: SJSU to Independence High School and return).

10. Total Calculations
    - These fields should automatically populate from expenses listed above (Be sure that Amount Approved matches Amount Due -- If they don’t match, simply enter the amount that's in the "Amount Due" field into the Amount Approved and Amount Paid fields.)

11. Funding Source/Chartfields:
    When completing your online travel claim, enter Dept. ID# 1368 (Teacher Education Department) in the first line of the “Funding Source/Chartfield” section and put $1.00 for the amount to be reimbursed from our department. Click on the + to create a second line. Then in the second line enter Dept. ID# 1176 (College of Education) and enter the remaining balance (minus the $1.00) to be reimbursed by them (see Funding Source/Chartfield example below). This is done because it needs to be approved by the Teacher Ed Department even though the College of Ed is paying for it.
    - Click on + to add a second line
    - Line #1:
      - Account: 606001
      - Fund: 70000
      - DeptID: 1368 [Teacher Ed Dept.]
12. Save:
   - The Travel Reimbursement Request must be saved before you can have the ability to submit it.

13. Submit:
   - Click Submit to send for approval/processing (if the “Status” field of your Travel Reimbursement Request says Open, then it has not yet been submitted by you).

The following is required from employees who drive on university business:

1. **Authorization to Use Privately Owned Vehicles on State Business** [PDF].
   The "Authorization To Use Privately Owned Vehicles On State Business" form needs to be signed annually. The form that you originally completed is kept in Marie’s office.
   - Please contact Marie each year to keep this form current.

2. **Defensive Driver Certificate** (only if driving on an average of more than once a month)
   Complete the Defensive Driver Training online course at CSULearn which can be found on your one.SJSU page (which requires an SISUOne Account for login). The Procurement/Accounts Payable Office will check if the Defensive Driver Training was complete when they process the travel claims. No claim will be processed unless this training has been completed. **NOTE: Certificate expires after 4 years.**
   - Please submit a copy of your Defensive Driver Certificate to Marie and/or Lavette.

For more information, please visit the "Driving on University Business" page of the SJSU Finance department website.

Please contact Lavette if you have any questions:

Lavette.Hay@sjsu.edu
408-924-3761
SH 305

If you need additional assistance pertaining to Finance policies and processes, Finance Open Labs are held every other week, or you can contact Finance Connect for help by emailing financeconnect@sjsu.edu or calling 408-924-1558.