

Faculty Travel and Virtual Conference Guide

AY 2020-2021

AY 2020-2021 Approval Processes for Actual (In-Person) Travel

During AY2020-2021, travel is governed by both budget constraints and by COVID-19 public health guidelines. Therefore, the processes for approval are different this year than from previous years.

The CSU Chancellor's Office announced that non-essential international and domestic travel will be suspended through June 30, 2021. For more information, please view the [FY2020-21 Systemwide Meetings and Conferences](#) memo.

All essential travel requires approval from the President. There are different routes for obtaining travel approval depending upon the purpose of the travel.

RSCA-Related Actual (In-Person) Travel

The President has delegated authority to approve RSCA-related travel to the Vice President of Research and Innovation (VPRI). If you are traveling locally, domestically, or internationally to support RSCA, you must complete the Return to RSCA process and forms as provided on the SJSU Adapt website: <https://www.sjsu.edu/research/covid-19-adaptation/index.html>.

Through this process, you will receive approval from the College and the Division of Research and Innovation.

1. Traveler completes the [Environmental Health & Safety \(EH&S\) Checklist \(PDF form\)](#).
2. Traveler uploads the EH&S Checklist to the [SJSU RSCA Project plan \(Google Form\)](#)
3. The VPRI and Dean will confer. If denied, traveler will be notified.
4. If approved, the Project Plan will be reviewed by SJSU Environmental Health and Safety. If approved, the VPRI and Dean will be notified.
5. Dean will notify the Traveler.
6. Traveler enters a travel authorization request into FTS and uploads the RSCA project plan approval.
7. Department Chair and Dean's Office will review and approve. International travel will still require Provost and Presidential approval in FTS.

Given these multiple steps of review and multiple offices involved, travelers should submit requests at least 30 days prior to travel. (60 days is typically required for international travel, once international travel is allowed again; 9 weeks is required for high-hazard travel).

Only essential travel will be approved by the VPRI. Essential travel is currently defined by the VPRI as travel relating to current RSCA. That is, travel must be necessary to the completion of on-going or new RSCA projects. Travel to present or share previously completed RSCA projects is not considered essential and will not be approved.

Non-RSCA Actual (In-Person) Travel

If you are traveling for a work-related reason that is unrelated to RSCA, you should submit your travel as described on this website: <http://blogs.sjsu.edu/financeconnect/2020/08/14/adapted-travel-process-for-presidential-approval/>

1. Traveler submits request through FTS
2. Once the traveler has received travel authorization from department chair and dean's office, the department admin/analyst should be notified.
3. The department admin/analyst should complete the [Academic Affairs Travel Form](#).
4. The travel request will be forwarded to the Provost's Office who will forward the request to the President's Office.
5. The President's Office will notify the Provost's Office of approval/denial of the travel request.
6. The Provost's Office will notify the traveler of the approval/denial of the travel request.

Regardless of funding source or expectation of reimbursement, anyone who represents themselves as a student, faculty, or staff member of SJSU while traveling must complete a travel authorization. This is especially important if you are traveling during the academic year i.e. duty days.

AY 2020-2021 Approval Processes for Virtual Conference Attendance

In order to receive authorization and reimbursement for Virtual Conference attendance, you will need to submit a request via FTS. Instructions on how to submit that request are available here: <https://docs.google.com/document/d/1S5GOVoIGrXLSifrOLW5RPml5TGXvwEge7AAHwqhNfUo/e/dit>

Please note the following:

- For "location" of the event, you should enter **your** location. If you are residing in a banned travel state, please contact the Dean's Office.
- Upload the Conference / Workshop Agenda/Schedule/Brochure, with dates and times.
- IF your funding source is from state general funds, such as start up funds, registration fees need to be paid on the department GoCard
 - Even though the traveler would not be incurring any personal costs requiring reimbursement, the reimbursement form automatically created from the approved travel authorization should still be submitted by the traveler.
 - On the reimbursement form, indicate the registration amount was "Paid by SJSU".
 - To ensure the university, as well as the division, is able to accurately capture conference-related costs, departments must use either of the following account codes for registration fees when reconciling the GoCard:
 - 606802 - Professional Meeting Costs
 - 660009 - Training & Professional Development
- If the expense is being funded through an auxiliary (Research Foundation or Tower Foundation), be sure to follow their travel policy and process.

The full SJSU travel guide (available here: www.sjsu.edu/finance/docs/travel_guide.pdf) and your department administrator/analyst and your department chair are your final source of up-to-date information.

	SJSU General Funds	Research Foundation	Tower Foundation
Requires Presidential/VPRI approval	✓	✓	✓
Pre-Authorization via FTS required	✓	✓	✓
Can prepay expenses with GoCard	✓		
Can prepay registration via a requisition		✓	✓
Submit Reimbursement via FTS	✓		
Requires paper travel claim submission		✓	✓
Requires 2-step travel authorization process		✓	
\$275.00 per night lodging limit (pre-taxes / fees)	✓		

Before you go...

Authorization for ACTUAL travel in FTS

To ensure a complete and successful travel reimbursement you must plan early. All faculty, staff, and students are required to obtain authorization to travel **prior** to the start of any business trip. Keep in the mind the following:

Information required

- **Estimates of travel expenses.** Include transportation, meals, registration, lodging. Keep in mind the following limits:
 - \$55 maximum reimbursement per full day for meals. If the conference provides meals, you will not receive reimbursement for meals outside of the conference.
 - \$275 is the limit per night (excluding taxes) for domestic lodging.
- **Travel itinerary.** Include dates when you will be off campus, but not attending the conference or work-related event.
- **Covering duties.** If you will be away on a duty day, indicated how teaching and other responsibilities (including service) will be covered.

Required Attachments

- **Conference / Workshop Back-Up.** This can be the brochure, agenda, preliminary/draft schedule.
- **Proof of presentation.** This may be an acceptance letter, copy of the conference program, or letter of invitation. If unavailable, provide information about the conference.

Restricted States

- State funds may not be used to travel to states with discriminatory laws. Currently this includes Alabama, Idaho, Iowa, Kansas, Kentucky, Mississippi, North Carolina, Oklahoma, South Carolina, South Dakota, Tennessee, Texas. (see current list on the State of California Department of Justice site: <https://oag.ca.gov/ab1887>)

Key Points

- **Economy Class Fares.** Before your purchase

your tickets, know that SJSU's travel guide indicates that "Transportation by scheduled airlines shall be allowed at the lowest fare available at the time of booking." For some airlines, that may be a stripped down fare that does not include assigned seats or carry-on baggage. If a traveler has a business reason for purchasing other than the lowest fare available, that reason should be noted in the **FTS reimbursement document** in the "Additional Trip Details" field.

- **Use of private car.** If you will be requesting reimbursement for mileage for travel to the airport from home or work, you must have the [authorization form](#) completed BEFORE you travel.
- If you rent a car and want the extra insurance paid for by SJSU, you must rent through Fell Travel

International Travel

- As of August 18, 2020 all international travel approval is suspended.
- Travelers may be asked to self-quarantine for 14 days following return to the area.
- International travel authorization must reach the President's office at least 30 days in advance of the departure.
- Submission 45 days before the trip is recommended for countries not deemed high hazard; 60 days is required for those countries that are considered [high hazard by the CSU](#) or by the [State Department](#).
- Passing through a high hazard area (i.e., some states in Mexico) on the way to a non-high hazard location will require a [High Hazard Travel Approval Form](#).

When you return...Travel Reimbursement

If you have planned ahead, there should be no surprises when you submit your travel reimbursement. Keep in the mind the following:

- ➔ Travel reimbursements should be submitted through FTS within 30 days of return.
- ➔ Travel using University funds cannot be reimbursed across fiscal years. If you travel during AY 2020-2021, you must submit all travel reimbursement requests by June 1, 2021. (Please consult your admin for potential differences in deadlines depending on funding)

Information required

- ➔ **Your travel authorization or TripID number.** Once you have an approved Travel Authorization, a Travel Reimbursement will be automatically generated in FTS for you. Use the Travel Reimbursement corresponding to the Travel Authorization number.

Required Attachments

- ➔ Documents submitted with the authorization in FTS will automatically attached to the travel reimbursement request.
- ➔ **Original Receipts.** Receipts are not required for purchases less than \$75. However, for flight, transportation, and registration, itemized receipts are needed.
- ➔ **Proof of purchase.** If the payment method is ambiguous or lost include a copy of your bank statement as proof of payment.
- ➔ **Proof of presentation.** If not included in the travel authorization, include now.
- ➔ **Proof of mileage.** If claiming mileage include a map (e.g. MapQuest, Google Map), with the start/end points and miles traveled. Remember to include the round trip mileage. Include airfare quote if you drove to your

Key Points

- ➔ On the reimbursement form, only indicate "Paid by SJSU" if it has already been charged to a University GoCard.
- ➔ Use notes area to explain business expense or unusual circumstances.
- ➔ Maximum reimbursement for meals is \$55 per day.
- ➔ Tower Foundation DOES require receipts for all expenditures.
- ➔ Research Foundation allows you to request per diem or submit specific expenditures.
- ➔ If you are sharing a hotel room, make sure that your name is on the invoice for all days that you stayed. Make sure you pay separately and have separate receipts for your stay.
- ➔ If you rent a car, you can submit the rental and gas receipts for reimbursement.

Exceptions/Special Cases

Research Foundation

- ➔ If you pay for student's or colleague's meals please submit their names along with receipts. List as a business expense and add a note on the claim.
- ➔ Rental collision insurance can be reimbursed without reserving through Fell Travel.
- ➔ Airline tickets, conference registration, and lodging are typically reimbursed after. It may be possible to arrange for an advance, with consultation of the Sponsored Programs Manager.

Student Travel

SJSU students must follow all the same policies and guidelines as SJSU employees. It is the responsibility of faculty and staff to ensure that they are aware of these policies and guidelines.

All students traveling as representatives of SJSU must complete a travel authorization. This is true whether or not they have travel funding from SJSU, and provides them protection related to risk management. Students who are not SJSU employees do not have access to FTS and therefore must complete a paper version of the [Travel Approval Request](#).

Quick Links

Travel Authorization: FTS

- ➔ The Financial Transaction Services ([FTS](#)) online system (also at [one.sjsu.edu](#)).
- ➔ FTS Travel Authorization [tutorial](#)
- ➔ The Research Foundation travel authorization is a separate process. See RF travel page: <https://www.sjsu.edu/researchfoundation/resources/travel/index.php>. The RF travel approval requires first obtaining documentation of approval through FTS form. See the Research Foundation Travel Approval and Expense Guide and the Approval of Travel Form: <https://www.sjsu.edu/researchfoundation/docs/Request-for-Approval-of-Travel-Form.pdf>

Travel Reimbursement

- ➔ SJSU/CSU funded FTS Travel Reimbursement [tutorial](#)
- ➔ Research Foundation reimbursement: <https://www.sjsu.edu/researchfoundation/docs/Travel-Expense-Claim-Form.pdf>
- ➔ Tower Foundation reimbursement [form](#).

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.

- ➔ CHHS Travel Policy
- ➔ SJSU Travel Guide
- ➔ Research Foundation Travel Policy
- ➔ Tower Foundation Policy

Other Useful Links

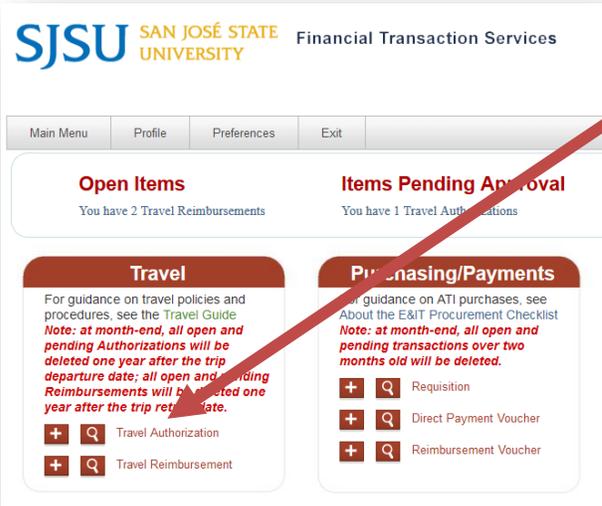
- ➔ [Fell Travel: SJSU Reservation Online Form](#) (official SJSU travel agency)
- ➔ [Per Diem rate](#)-for travel within continental U.S.
- ➔ [Per Diem rate](#)- for travel outside continental U.S. i.e. Alaska, Hawaii, US Possessions and Territories
- ➔ [Per Diem rate](#)-for foreign travel

How to create a travel authorization in FTS

Step 1



Step 2



Under "Travel" select

+ **Q** Travel Authorization

Step 3

Request for Authorization to Travel

Header Information

Note: Fields preceded by asterisks indicate required fields.

Status	New
Trip Number	NEW
Requestor Name	Your name will appear here
Requestor Phone	Your SJSU phone # will appear here
Requestor Email	Your SJSU email will appear here
* Traveler Home DeptID	INSERT YOUR DEPT ID HERE
<i>Note: Approval is based on traveler's DeptID.</i>	
* Traveler Name	Your name
Employee ID Number	Your SJSU ID
* Traveler's University Affiliation	<input type="radio"/> Faculty <input type="radio"/> Staff <input type="radio"/> Student Employee
SELECT "Faculty" HERE	

DEPT ID	
AUD	1611
Dean's Office	1013
HTEM	1030
KIN	1142
NURS	1118
NUFSP	1146
OT	1007
PH&R	1097
SW	1116
Stdnt Succ Ctr	1552

Step 4

Trip Information

* Departure Date

* Return Date

* Destination
 Country
 State
 City

* Purpose of Trip

* Travel Type
 Business Related
 Team Travel
 Field Supervision Travel

* Funding Source
 Travel Paid By University Funds (Default)
 Travel Paid By Non-University Funds

Additional Trip Details

Provide details about funding or anything unusual that the approver should be aware of (e.g. if high hazard form is attached). More is better.

Step 5

Insert the DeptID for the unit providing the fund. Typically, your home department.

Funding Source/Chartfields

Line #	* Account	* Fund	* DeptID	Program	Class	Project	* Amount	Percentage
1	606800	70000			4391		0.00	0.00

For state-funded travel, account #s are:

- International travel = 606800
- California travel = 606001
- Other domestic travel = 606002
- Virtual Conferences = 606802 (Professional Meeting Costs)
- 660009 (Training & Professional Development)

Step 6

Click "Save". Then, you'll see the dialog box for uploading attachments

Save

Step 7

Use pulldown menus to select the type of document you are uploading. Then upload.

Airfare	Browse...	No file selected.	+	-
Backup Documents	Browse...	No file selected.	+	-
Lodging	Browse...	No file selected.	+	-
Registration	Browse...	No file selected.	+	-
Taxi/Shuttle/Parking	Browse...	No file selected.	+	-
Meals	Browse...	No file selected.	+	-

Upload Attachment(s)

For File Upload:
* The upload functionality works in browser IE 10 and above, Firefox and Chrome.
* Accepted most common file types for upload are pdf, txt, doc, docx, xls, xlsx, jpg, jpeg, gif, png and bmp.
* The file name cannot contain characters such as ?, #, *, and %.
* Separating files by doc type is optional; files including multiple doc types is allowed.

Step 8

Click "Submit" and then monitor your request as it proceeds through FTS.

Submit