

Changes to CSU Travel Policy & SJSU Changes to FTS

Please see the related Finance Connect announcements for details and links to resources:

- [Travel Meal and Incidental Expense \[M&IE\] Reimbursements](#) [Jan. 2, 2024]
- [Changes to Travel Reimbursements in FTS](#) [Jan. 8, 2024]

Use the step-by-step process below based on the **departure date of the traveler**.

If the trip took place **entirely in 2023 or began before January 1, 2024**:

Follow the **2023 Travel Process** for claiming Travel Reimbursement for **SJSU Employees**, detailed below.

- Complete the Daily Charges section in FTS with **Daily Expense** details:
 - Enter actual daily expenses: meals, taxi/shuttle/parking, incidentals, and other business related expenses.
 - Click the **+** button to create a row for each trip date.
 - Meal cannot be claimed if conference provided one.
 - Enter **Business Expense Explanation** if amount was entered in **Business Expense** field.

Date Of Trip	Depart/Return Time	Meals	Incidental	Taxi/Shuttle/Parking	Business Expense	Total Expenses for Day
11/14/2023	06:00	0.00	0.00	0.00	0.00	0.00
11/15/2023		30.15	7.00	20.00	0.00	57.15
11/16/2023		55.00	7.00	0.00	10.00	72.00
11/17/2023	16:45	9.99	7.00	25.00	0.00	41.99

Business Expense Explanation: 11/16/2023 Purchased copy services for handouts to give at event.

- Complete the Daily Charges section in FTS with **Daily Mileage** details:
 - Enter mileage if Traveler drove personal vehicle for trip.
 - Click the **+** button to create a row for the start and end dates.
 - Use resources such as Google Maps to determine mileage.
 - Starting point will be either SJSU or Traveler’s home, whichever is the shortest distance to the destination.

Date	Miles	Rate	Amount	Between what points was the car driven (note *and return* if round trip)
11/14/2023	25.00	0.655	16.38	Home to SJC Airport
11/17/2023	25.00	0.655	16.38	SJC Airport to Home

Note: If you used your own vehicle for travel an Authorization to Use Privately Owned Vehicles on State Business form must be on file in your department.

3. Under **File Upload**, attach all documentation supporting the travel reimbursement claim:

- **IMPORTANT!** Click **Save** prior to uploading backup files.
- Upload supporting backup documentation associated with the reimbursement [e.g. receipts].
- Related Files will include backup documentation already uploaded in the Travel Authorization.

4. Click **Submit** to start the approval process.

File Upload

* Document Type: Meals * Select File: Choose File DB_Dat...254.pdf + -

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.

Related Files

- TR058341_Sample of Travel Claim.pdf

Save
Submit
Cancel
Print

If the trip will begin **on or after January 1, 2024:**

Follow the **2024 Travel Process** for claiming Travel Reimbursement for SJSU Employees, detailed below.

1. Using the new [SJSU Travel Claim Worksheet](#), itemize your daily trip expenses for Meals & Incidentals Expenses [M&IE], and Mileage:

- Use the worksheet for [Employee \[shown, in blue\]](#) as applicable.
- Follow the Instructions tab in the worksheet.

Video: [How to use the new Travel Claim Worksheet with examples](#)

Instructions: Enter the values into the blue colored fields. When available, select from the drop down options. Enter all values in US Dollars. For more details, refer to the instructions tab.

Today's Date: 1/5/2024		Campus ID: 5810 - San Jose State																																																										
Travel Purpose: 		Travel Start Date: 																																																										
Travel End Date: 																																																												
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="font-size: x-small;"> Location (Only Enter Lodging Destinations) <table border="1" style="font-size: x-small;"> <tr> <td style="width: 50%;">Domestic Rates (USA)</td> <td style="width: 50%;">Alaska/Hawaii (D&G) or International Rates (State Dept)</td> </tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table> </div> <div style="text-align: center;"> </div> <div style="text-align: right;"> ➔ </div> </div>				Domestic Rates (USA)	Alaska/Hawaii (D&G) or International Rates (State Dept)																																																							
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2. As before, complete the **One Time Charges** section with individual rows for airfare, lodging, registration, and transportation e.g. rental car.

One Time Charges

Note: Supporting documentation is required for any expense \$75 or more.

Expense Type	Amount	Paid by SJSU?	Payment Method
Airfare	500.00	<input type="checkbox"/> Yes	Other + -
Lodging	380.00	<input checked="" type="checkbox"/> Yes	GoCard + -
Registration	600.00	<input checked="" type="checkbox"/> Yes	GoCard + -


3. In the **Daily Expenses** section, enter **Total Daily Expenses** [Meals, Incidentals, and Mileage, excluding One Time Charges in Step 2] based on the total amount calculated on the Travel Claim Worksheet [in Step 1].

Daily Expenses

Utilize the SJSU Travel Claim Worksheet to calculate per diem meals and incidental expense when there is an overnight stay, add ground transportation and business expenses for each travel day as needed. Enter the total amount for the trip in the 'Daily Expense Total' field below.

Generate a PDF copy of the completed worksheet and upload to this travel reimbursement. This documentation is **REQUIRED**.

[Download SJSU Travel Claim Worksheet](#)

Total Daily Expenses: 

4. In the **Total Calculations** section, FTS will calculate totals from all amounts entered.

Total Calculations

Total Expenses:	1,403.35
Amount Authorized:	1,324.00
Expenses Paid by SJSU:	650.00
Advance Received:	0.00
Amount Due: 753.35	
Amount Approved: 737.72	

The Approved Amount is what is due to the traveler

5. Under **File Upload**, upload **NEW** Travel Claim documents:

- Click **Save** prior to uploading backup files.
- Select Document Type **Daily Expenses**.
- Upload other supporting documentation associated with the reimbursement [e.g. receipts].
- Related Files will include backup documentation already uploaded in the Travel Authorization.

File Upload

* Document Type


Daily Expenses

Airfare
 Backup Documents
 Business Expenses
Daily Expenses
 Email
 Lodging
 Meals

* Select File

Browse... No file selected. + -

Browser (IE, Firefox, and Chrome).
 For upload, use pdf, txt, doc, docx, xls, xlsx, jpg, jpeg, gif, png and bmp.
 Characters: ? , # , * , and %.
 Note: files including multiple doc types is allowed.

Save 

5. Click **Submit** to start the approval process.

