

SJSU

Travel Guide

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Introduction

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 the 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.

For specific information on special circumstances that is not addressed in this document please refer to the [CSU Travel Policy](#). 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:

Fell Travel

<http://www.felltravel.com/>

Phone: (800) 321-3355 or (650) 827-7300

For after-hours emergency: (800) 213-6604

Travel reservations can be requested by completing the [SJSU Reservation Form](#) online. *There is a \$20.00 processing fee charged by Fell Travel for reservations requested via SJSU Reservation Form, phone, or email. Fee for international travel is \$25.*

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 \$20.00) will be reimbursed.

Authorization to Travel

ATTENTION: Out-of-State domestic travel restriction effective January 1, 2017, applicable to SJSU. See [Appendix E](#) - No travel to state(s) with laws enacted to void or repeal discrimination protections, or, to authorize or require discrimination.

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.

The CSU has implemented a \$275 per night maximum lodging rate, excluding taxes, for in-state and out-of-state travel, including Alaska, Hawaii, and US possessions.

Rates in excess of this amount must be pre-approved by the campus vice president or designees in accordance with the campus approval process, and must include the business purpose for the necessity to stay within certain facilities. In order to utilize our existing travel authorization process in [Financial Transaction Services \(FTS\)](#), all campus AVPs have been delegated authority to approve lodging rates in excess of the per night limit within the state of California; out-of-state travel requires the approval of the appropriate Vice President.

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 for Travel Authorization and Reimbursement

Approval Type	Type of Travel	Approval Process	Level of Approval
Request for Approval of Travel	Domestic In-State	Approved in FTS	Approving Official and Associate Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	Domestic Out-of-State	Approved in FTS	Approving Official and Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	International	Approved in FTS	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 and approved in FTS	Approving Official

Approval of Lodging Rates Exceeding Established Maximum of \$275

Approval Type	Type of Travel	Approval Process	Level of Approval
Request for Approval of Travel	Domestic In-State	Approved in FTS	Approving Official and Associate Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	Domestic Out-of-State	Approved in FTS	Approving Official and Vice President (except Academic Affairs, where Deans are the highest level required)

Responsibilities

Traveler

Individuals traveling on official university business must familiarize themselves with and adhere to the SJSU Travel Guide. 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 Travel Authorization request in Financial Transaction Services (FTS). 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 must:

- Clearly state the business purpose and inclusive dates of each trip:
 - Attach the conference agenda or outline.
 - For “business meetings,” include who the meeting is with and for what purpose.
 - Clearly identify any personal time added onto or included within the trip date range.
- Submit a travel reimbursement request within 60 days from the return of the trip. Certifying that they:
 - Received authorization to travel.
 - Traveled on official university business.
 - Actually spent the amount listed for expenses.
 - Verified that the amount due is accurate.
 - Provided detailed/itemized receipts for all expenses incurred and amounting to \$75 or more.

- Regardless of amount, provided detailed/itemized receipts for any prepaid expenses, such as conference/registration fees and airline tickets, made by the university or the traveler.¹
- Return any reimbursement or payment issued by the university which subsequently results in a refund to the individual within 60 days.

Approving Official

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.

¹ Prepaid expenses are known as One-Time Charges in FTS Travel Reimbursement.

Travel Insurance

All university employees, including those engaged by the university in connection with research grants and contracts, are routinely covered 24 hours a day, worldwide, against accidental death or dismemberment while on an official university business trip or while engaged in designated extra hazardous activities on behalf of the university.

In addition, all university employees are provided with Workers' Compensation coverage for work related injury or illness that occurs during a university-approved and -funded business trip.

For insurance coverage purposes, 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.

Refer to the [CSU Risk Management](#) for additional information on university insurance coverage for employees.

Request should be submitted 30 days prior to travel.

Information regarding insurance for international travel can be found in the university Risk Management [International Travel](#). Specific questions should be directed to them at (408) 924-2159.

Emergencies

In case of emergencies while on travel status, the traveler should first contact emergency responders at their location. The traveler's appropriate administrator and university Risk Management should be informed as soon as possible.

Employees covered by the CSU Group Life insurance plan through Standard Insurance Company are also covered by the MEDEX Travel Assist program (Group #7088) when traveling at least 100 miles from home or in a foreign country. For more information see your university Payroll/Benefits office. Additional information about coverage can be found at [CSU Systemwide Human Resources](#).

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 completed [Certification of Receipt of Goods](#) form 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.

The CSU has implemented a \$275 per night maximum lodging rate, excluding taxes, for in-state and out-of-state travel, including Alaska, Hawaii, and US possessions.

Rates in excess of this amount must be pre-approved by the campus vice president or designees in accordance with the campus approval process, and must include the business purpose for the necessity to stay within certain facilities.

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 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 \(Std. 236\)](#) form and request an exemption certificate. Many hotel/motel chains have their own form. A university issued Tower (ID) 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. Refer to the U.S. General Services Administration [Federal Per Diem Rates](#) for all locations.

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 expenses for travel within the contiguous 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.

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 contiguous United States are found in Section XII. Travel to Alaska, Hawaii or the U.S. Possessions and XIII. International Travel of the [CSU Travel Procedures](#) document.

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 the university [Hospitality Guidelines](#).

Incidental Expenses

Incidental expenses for travel within the contiguous United States will be based on actual amounts incurred up to a maximum of \$7 per 24 hour period. 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, Internal Revenue Service regulations state that 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 contiguous 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 D for Travel of Less Than 30 Days of the [CSU Travel Procedures](#). 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 IRS 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.

- Airfare
- Lodging
- Rental car
- Expenses of \$75.00 or more
- Miscellaneous expenses

Travel Advances

Travel advances are available only for international, extended domestic, or team travel. Conference fees should be paid with the university [GoCard](#) directly to the conference. 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 60 days of the completion of travel.

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 [Fell Travel](#), 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.

- **Economy Class Fares and Upgrades:**

Airlines are increasingly offering stripped-down economy class airfares by removing such amenities as assigned seats and the ability to bring carry-on baggage. SJSU's Travel Guide states, "Transportation by scheduled airlines shall be allowed at the lowest fare available at time of booking." 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 where Approving Officials can easily see it – preferably in the "Additional Trip Details" field. If the business reason for an upgrade is indicated in the FTS reimbursement request, approval of the request by an Approving Official indicates approval of the upgrade. If the business reason for an upgrade is not indicated in the reimbursement request, Finance will ask the traveler for a justification, and may refer weak cases back to the Approving Official for review.

Travelers are responsible for the cost of unapproved upgrades. If the purchase was made via a GoCard, the traveler will be asked to reimburse the University.

Travelers may elect to upgrade their seats using personal resources. If not handled as a separate transaction, the FTS reimbursement request should include only the base fare amount.

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 [Fell Travel](#) whenever possible and a compact, economy, or intermediate vehicle should be requested. These classes should be used unless a no cost upgrade is provided. Business justification is required for any rental vehicle upgrades above the aforementioned classes. 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.

The following rules apply to insurance coverage for rental cars obtained through the approved State car rental agency:

- On contract rental vehicles used in the contiguous United States, charges for additional insurance are not allowable, including any charge for a collision damage waiver (CDW).
- Additional charges for insurance coverage will not be reimbursed if a non-contract agency is used, unless no car rental company in the area has such an agreement with the university.
- The cost of full collision coverage for rental cars used in Alaska, Hawaii, U.S. possessions, and foreign countries, is allowable.
- A vehicle rented from an agency with which the university has an agreement is not covered by insurance when it is being used for a personal day of travel.

Some rental car agreements contain special coverage provisions that differ from the general coverage rules detailed above. For additional information, refer to the California [Department of General Services](#). The university Risk Management should be contacted for information on campus-specific contracts or insurance coverage.

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. Reservations with Enterprise Rent-A-Car should be made through Fell Travel in order to obtain the State contract rate. The list below includes maximum daily rates for compact vehicles.

Contractor	Enterprise Rent-A-Car	Enterprise Holdings, Inc. National Rental US
Base Rate	\$33.00	\$33.00
Max Rate	\$53.00	\$53.00

Special Vehicles: Special vehicles (e.g. 16-passenger vans and trucks) can only be requested on a [Requisition](#).

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 \(Std. 261\)](#) form 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.

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. 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.

The mileage reimbursement rates are as follows:

- Business travel **before** January 1, 2022 is 56 cents per mile.
- Business travel **on or after** January 1, 2022 is 58.5 cents per mile.
- Business travel **on or after** July 1, 2022 is 62.5 cents per mile.

Defensive Driving Course

All employees authorized to use private vehicles to conduct university business must have satisfactorily completed a CSU approved defensive driving course. Defensive driving courses are offered on-line by [University Personnel](#).

For more information regarding defensive driving courses contact university Risk Management at (408) 924-2159.

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 \(Std. 261\)](#) form 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 minimum prescribed liability insurance coverage an employee should carry is as follows:

- \$15,000 for personal injury to, or death of, one person;
- \$30,000 for injury to, or death of, two or more persons in one accident; and
- \$5,000 for property damage.

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 and 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 \(Std. 270\)](#) form within 48 hours and submit the form to:

**San José State University
Risk Management
One Washington Square
San José, CA 95192-0004
Fax: (408) 924-2159**

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. 270) form 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 Guidelines](#).

For more information about SJSU driving requirements and to obtain required forms for both university and private vehicles, refer to university Risk Management [Driving on University Business](#).

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 60 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 become reportable as income subject to payroll tax withholding in accordance with IRS regulations. If this action is necessary, the privilege of receiving advances will be revoked.

Travel Reimbursement Request Instructions

Within 60 days of trip completion, the traveler must submit a Travel Reimbursement request in FTS, along with all the required backup documentation/receipts. 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.

Non-Reimbursable Expenses

This section identifies various expenses not addressed elsewhere in this policy that are not permitted using university funds. Non-reimbursable expenditures can be characterized as those with a personal purpose and will not be reimbursed by the university. Per [California Government Code § 8314 \(b\)\(1\)](#), “Personal purpose’ means those activities the purpose of which is for personal enjoyment, private gain or advantage, or an outside endeavor not related to state business.”

The following non-reimbursable expenditures are only meant to provide examples of expenses that will not be reimbursed by the university. Such expenses include but are not limited to personal domestic ATM/credit card fees; fines/citations; clothing and accessories; frequent traveler program participation; account fees or deposits for FastTrack (or equivalent) that are not related to individual toll charges; club membership fees; luggage (lost luggage may be covered); personal entertainment; personal care; and dependent/pet care.

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 hard copy [Travel Reimbursement Request](#) form 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 the 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

It is highly recommended that you submit your travel authorization at least 45 days prior to your trip in order to meet the requirements of approvals and obtain trip insurance before travelling especially when it involves a high-hazard country. 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. Information regarding insurance for international travel and high hazard countries can be found in university Risk Management [International Travel](#).

Travelers to foreign destinations will receive a fixed amount for lodging, meals and incidentals in accordance with the [Foreign Per Diem Rates by Location](#) published by the U.S. Department of State. Detailed/itemized receipts for all expenses amounting to \$75.00 or more must be included with the reimbursement request.

If actual expenses claimed are greater than the rates outlined in Foreign Per Diem Rates by Location, 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.

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.

University Credit Card

GoCard Program

The university implemented the [GoCard Program](#) to prepay expenses related to official university travel.² The card is issued only to staff responsible for arranging and coordinating travel for their department.

² Prepay expenses are known as One-Time Charges in FTS.

Travel must be approved in advance of making non-cancellable travel arrangements via the Travel Authorization in FTS. For non-university employees, travel related expenses must be approved in advance of making non-cancellable travel arrangements via the [Travel Approval Request](#) form. The GoCard provides the following insurance coverage:

- Car Rentals – When using the GoCard for car rentals, liability insurance is covered in the amount of \$500,000 per traveler.
- Life Insurance – When using a GoCard for expenses related to official university travel, life insurance is covered in the amount of \$500,000 per traveler.

Allowable GoCard Expenses:

- Airfare
- Car Rentals
- Conference fees
- Lodging
- Parking/Taxi/Shuttle
- Registration fees
- Toll Fees
- Travel arrangements made through the official university travel agency Fell Travel

Prohibited GoCard Expenses:

- Gasoline for private or rental vehicle
- Meals
- ANY expense not related to official university business
- Cash advances

For more information, please refer to the [GoCard Program Guide](#).

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.

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 contiguous 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.

Non-Employee Travelers: Travelers in this category include prospective employees, independent contractors and consultants, students and non-degree candidates, volunteers, foreign visiting scholars, spouses, and registered Domestic Partners.

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: PDF format forms require the free [Adobe Acrobat Reader](#) for viewing.

Authorization to Use Privately Owned Vehicles on State Business (Std. 261)

<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std261.pdf>

Certification of Receipt of Goods

https://www.sjsu.edu/fabs/docs/receipt_of_goods.pdf

Hotel/Motel Transient Occupancy Tax Waiver Exemption Certificate (Std. 236)

<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std236.pdf>

SJSU Reservation Form

<https://www.felltravels.com/forms-new/sjs/secure.asp>

Travel Approval Request

https://www.sjsu.edu/fabs/docs/travel_approval.pdf

Travel Reimbursement Request (xls)

https://www.sjsu.edu/fabs/docs/travel_claim.xls

Vehicle Accident Report (Std. 270)

<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std270.pdf>

Appendix C

References

Note: PDF format documents require the free [Adobe Acrobat Reader](#) for viewing.
(<https://get.adobe.com/reader/>)

California Government Code § 8314 (b)(1)

http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=GOV§ionNum=8314

CSU Risk Management

https://www.calstate.edu/risk_management/rm/

CSU Systemwide Human Resources

http://www.calstate.edu/Benefits/life_add/basic.page.shtml

CSU Travel Policy and Procedures

<https://cyou.calstate.edu/Policies/icsuam/Pages/3601-01.aspx>

CSU Use of University & Private Vehicles Guidelines

http://www.calstate.edu/risk_management/documents/VehicleUseGuideBook.pdf

Delegation of Authority for the Approval of Financial Expenditures

<https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/daafe.php>

Department of General Services

<https://www.dgs.ca.gov/>

Department of General Services Risk and Insurance Management (ORIM)

<https://www.dgs.ca.gov/ORIM>

Department of General Services Statewide Travel Program

<http://www.dgs.ca.gov/Default.aspx?alias=www.dgs.ca.gov/travel>

Driving on University Business

<https://www.sjsu.edu/fabs/services/risk/insurance/driving.php>

Financial Transaction Services (FTS)

<https://one.sjsu.edu/launch-task/all/fts>

GoCard Program

<https://www.sjsu.edu/fabs/services/travel/gocard.php>

Hospitality Guidelines

<https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/hospitality-guidelines.php>

MOU CalState TEACH

http://www.calstate.edu/LaborRel/Contracts_HTML/current_cba.shtml

Requisition

<https://www.sjsu.edu/fabs/services/p2p/pay/requisition.php>

Travel Reimbursement

<https://www.sjsu.edu/fabs/services/travel/index.php>

U.S. Department of State Foreign Per Diem Rates by Location

https://aoprals.state.gov/web920/per_diem.asp

U.S. General Services Administration Federal Per Diem Rates

<https://www.gsa.gov/travel/plan-book/per-diem-rates>

Appendix D

University Departments

Payment Services Travel Specialists

<https://www.sjsu.edu/fabs/services/travel/contact.php>

Risk Management

<https://www.sjsu.edu/fabs/services/risk/index.php>

University Personnel

<http://www.sjsu.edu/up/>

Appendix E

Out of State Domestic Travel Restriction

No travel to state(s) with laws enacted to void or repeal discrimination protections, or, to authorize or require discrimination.

As of January 1, 2017, the CSU Travel Policy and Procedures will comply with Assembly Bill 1887, which added Section 11139.8 to the Government Code relating to discrimination and was approved by the governor. As a result of this new law, it has been determined that San José State University will be restricted from requiring employees to travel to certain states, and are prohibited from approving funding or sponsoring travel to those states. A current example of a state subject to these travel prohibitions is North Carolina, which in 2016, passed a law preventing local governments from passing anti-discrimination rules to grant protections to gay and transgender people.

The current list of restricted states is shown below, however, this can change at any time. The affected states are determined by the California State Attorney General, State of California Department of Justice, and the list is maintained on its website. Our recommendation is for travelers and approvers to check the websites listed in [Appendix E References](#) whenever planning out-of-state travel.

As determined by the CSU Chancellor's Office, the January 1, 2017 effective date for the travel restriction law applies to all states appearing on the Attorney General's list, regardless of when added. If you were authorized to travel to a state after January 1, 2017, but that state is later added to the DOJ list and your plans were to travel to this state after its addition, you may not be reimbursed for the travel and it must either be cancelled, or funded using private or other allowable non-state sourced funds.

Effective January 1, 2017

Alabama
Kansas
Kentucky
Mississippi
North Carolina
South Dakota
Tennessee
Texas

Effective June 22, 2018

Oklahoma

Effective April 15, 2019

South Carolina

Effective October 4, 2019

Iowa

Effective July 1, 2020

Idaho

Effective July 1, 2021

Florida
Montana

Effective July 8, 2021

West Virginia

Effective July 29, 2021

Arkansas

Effective August 1, 2021

North Dakota

Effective September 30, 2021

Ohio

Effective July 1, 2022

Indiana
Utah

Effective August 1, 2022

Louisiana

Effective September 28, 2022

Arizona

Appendix F

Virtual Travel

Virtual Conferences/Training: How & When to Submit in FTS

<https://docs.google.com/document/d/1S5GOV0IGrXLSifrOLW5RPml5TGXvwE9e7AAHwqhNfUo/edit?usp=sharing>

Virtual Meetings/Conferences FAQ's

<https://www.sjsu.edu/fabs/how-we-can-help/faq/travel-faq.php>

Exceptions to the new travel prohibitions may be granted for the following purposes:

1. Enforcement of California law, including auditing and revenue collection.
2. Litigation.
3. To meet contractual obligations incurred before January 1, 2017.
4. To comply with requests by the federal government to appear before committees.
5. To participate in meetings or training required by a grant or required to maintain grant funding.
6. To complete job-required training necessary to maintain licensure or similar standards required for holding a position, in the event that comparable training cannot be obtained in California or a different state not affected.
7. For the protection of public health, welfare, or safety, as determined by the CSU or other state agencies.

Travelers are required to document any allowable exceptions on their travel authorization and travel reimbursement documents.

The portion of Section 11139.8 pertaining to the new prohibitions states that, "...*the California State University...shall not do either of the following*":

1. *Require any of its employees, officers, or member to travel to a state that, after June 26, 2015, has enacted a law that voids or repeals, or has the effect of voiding or repealing, existing state or local protections against discrimination on the basis of sexual orientation, gender identity, or gender expression or has enacted a law that authorizes or requires discrimination against same-sex couples or their families or on the basis of sexual orientation, gender identity, or gender expression, including any law that creates an exemption to antidiscrimination laws in order to permit discrimination against same-sex couples or their families or on the basis of sexual orientation, gender identity, or gender expression.*
2. *Approve a request for state-funded or state-sponsored travel to a state that, after June 26, 2015, has taken the same actions as described in subsection 1) above.*

References

[Assembly Bill 1887](https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201520160AB1887)

https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201520160AB1887

[Assembly Bill 1887- Frequently Asked Questions](https://cyou.calstate.edu/Policies/icsuam/Documents/3000/CSU-Travel-AB-1887-faq.pdf)

<https://cyou.calstate.edu/Policies/icsuam/Documents/3000/CSU-Travel-AB-1887-faq.pdf>

[California State Attorney General](https://oag.ca.gov/ab1887) <https://oag.ca.gov/ab1887>

[CSU Travel Policy and Procedures](https://calstate.policystat.com/policy/10485892/latest/) <https://calstate.policystat.com/policy/10485892/latest/>

[AB 1887 - CSU Travel Restrictions-FAQ](https://cyou.calstate.edu/Policies/icsuam/SiteAssets/Pages/3601-01/AB%201887%20-%20CSU%20Travel%20Restrictions-FAQ.pdf)

<https://cyou.calstate.edu/Policies/icsuam/SiteAssets/Pages/3601-01/AB%201887%20-%20CSU%20Travel%20Restrictions-FAQ.pdf>