

# Supervision Travel Process

Added 10/30/2024 - [SJSU Travel Guide 2025](#)

The following steps are required from employees who drive on university business and want to be reimbursed for their mileage expenses:

## STEP 1

### [Authorization to Use Privately Owned Vehicles on State Business \[PDF\]](#)

This form needs to be signed annually and is filed in Teacher Education.

**New supervisors for F25 and S26 - send new forms to Marie via email or DocuSign.**

**Continuing faculty will be sent their form to update. Please do not start a new form if you turned one in last year.**

## STEP 2

### Defensive Driver Class and Certificate

**New faculty will not have access to this process until their hire process is completed. Marie will let you know when you can request this process.**

**Continuing faculty - if your certificate is not expired yet, you do not need to take the class or send me the form. I have these on file. If your certificate will expire within the current AY, you will need to retake the class but not until a month or so before the current certificate expires.**

**NEW as of 11/14/2022** - The Defensive Driving Course requires registration prior to starting the course. Complete the [following form to request the Defensive Driving course](#).

It asks for the class you like to

You will receive an email once the course is available to you.

Complete the [Defensive Driving Fundamentals](#) online course in CSU Learn. For details, go to the "[Driving on University Business](#)" page of the SJSU [Finance and Business Services](#) website. From [CSU Learn](#), hit **START**, then **Search** for **Defensive Driving** and take the course. Claims will not be processed unless this training has been completed. *NOTE: Certificate expires after 4 years.*

**NEW 9/9/2024** - When you've completed the Defensive Driving class, in SkillPort, open your training transcript. You should see the list of your course history. Next to each on the left is/maybe an icon that looks like a diploma. If one is there, open it and then save it to pdf and send that to me. This version should have your name and the certificate life cycle.

Once the Authorization to Use Privately Owned Vehicles on State Business and the Defensive Driving documents are on file in TED, the Travel requirements: a Blanket Travel request, Travel Reimbursement claim and Travel Claim Worksheet are next. These processes have changed.

### STEP 3

## **Blanket Travel Authorization form**

A new Blanket Travel Authorization form needs to be submitted in [Financial Transaction Services \(FTS\)](#) for each new academic year.

**Continuing faculty** - you can use a clone of the Blanket Travel Authorization approved for F24 or S25 as a starting point for the AY25-26 form. Once cloned you should review and update the field contents. Use dates AY24-25. Start Date - 8/18/2025 Return Date - 5/22/2026 See the screenshot example below. Or use the + icon to add a blank authorization form.

**New faculty** - Blanket Travel is an annual reimbursement requirement encompassing the Fiscal Year for primarily local travel or frequent travel for employees and staff involving mileage and parking reimbursement requests only. This is for individuals only, and not for any travel where an overnight stay is involved.

Blanket Travel Requests must follow these guidelines and must be ordinary, reasonable, not extravagant, and necessary to conduct official University business. Must be for **travel within California, travel dates within a fiscal year** (for travel dates between July 1<sup>st</sup> and June 30<sup>th</sup>) and only to be **used for the following expenses**:

- **Mileage** (private vehicle, motorcycle use is not allowed)
  - Motorcycles or motor-driven cycles, except those of University police department employees on motorcycle assignment, shall not be authorized for use on official University business, nor shall any reimbursement be made for the use of such vehicles.
- **Parking** (reasonable charges for parking)

See the [Blanket Travel Authorization screenshot](#) to guide you to set up a new Blanket Authorization form. Your submitted form will route to my attention. I'll review it. If correct, I'll verify and move it through the routing levels. You may receive an email when the form is approved. When approved, make note of the TR # as you will reference this # on the mileage claims below.

### STEP 4

## **Travel Reimbursement Claim**

### **Continuing and New Faculty -**

Claims are required to be submitted on a monthly basis no later than 2 weeks after the travel/month has ended. A new claim is required for each month in [Financial Transaction Services \(FTS\)](#).

**From one.sjsu.edu, open FTS. In FTS, Open a Travel Reimbursement, click on the  sign, the form will be prefilled with your information.**

## **Travel Reimbursement**

### **HEADER Section**

**Note the following:**

Status: (assigned by the system)

Traveler's University Affiliation:

- Faculty

**NEW** Travel dates: enter dates for the month traveled, eg. March 2025

- Departure Date: use 3/1/2025
- Return Date: use 3/31/2025

Destination:

- Country - United States

- State - California
- City - **Enter city or cites that most of your school sites reside in**

Purpose of Trip:

- Enter your supervision course and section #, eg. EDEL 143B-03, EDSC 184X-06, MTED 184Y-01

Travel Type:

- Field Supervision Travel

Additional Trip Details:

- enter this statement here: AY 2024-25 Blanket Authorization TR\_\_\_\_\_ (enter your approved Blanket Authorization #)

**Note: While the Blanket is for the entire Fiscal year, the Reimbursement Claims must be turned in monthly. This means that each month you create a new reimbursement request in FTS and reference the original Blanket Travel Authorization #.**

### One Time Charges

- Skip this section

### Daily Expenses

**Step 1:** Use this version (replaced 3/21/2025) of the [SJSU Travel Claim Worksheet - No Overnight](#), not the one linked in the FTS. reimbursement claim. Download the form and make a copy. Fill in the following:

**Name and SJSU ID #:** Ace Supervisor, # 123456789

**Travel Purpose:** enter “Fieldwork Supervision” and “Blanket Authorization #TR\_\_\_\_\_” (your approved #)

**NEW Travel Start:** 1st day of the month traveled

**NEW Travel End Date:** Last day of the month traveled

**Location (Site of Visit) box:** In Column B, enter on each line, the city where your school sites are located.

**Travel Details:** each **Daily Mileage Detail line needs the following entries:**

- **All sites visit entries MUST BE entered CHRONOLOGICALLY.** Not by student.
- Location: Use Drop Down Menu arrow to select the city for this site visit
- Rate Type: Leave this blank
- Notes: Enter the trip description, 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 or Home to Independence HS and return. To determine if SJSU is the shortest distance, use 200 E. SAN SALVADOR STR., SAN JOSE CA 95112 as the address in your Maps program**
- Travel Date: enter the date the school site visit took place
- Daily Mileage: enter the total round trip miles
- Total: the mileage will calculate using the current per mile rate of \$0.67
- Note the Daily Expense Total in Cell XY10,11,12. You’ll enter this total amount in FTS.
- Save as an Excel file and then again as a pdf file. You’ll upload the pdf file to your Travel Reimbursement.

**Step 2:** Enter the total daily expense in FTS.

### Total Calculations

This section will self populate, don’t change anything in this section.

### Funding Source/Chartfields

**NOTE: you need 2 chart fields lines, Line 1 and Line 2**

- Line #1:
  - Account: 606001
  - Fund: 70000

☐ DeptID: 1368 [Teacher Ed Dept.]

☐ Program: leave blank

☐ Class: 1080

☐ Project: leave blank

☐ Amount: \$1.00

▪ Click on **+** to add a second line

• Line #2:

☐ Account: 606001

☐ Fund: 70000

☐ DeptID: 1176 [COE Dean's Office]

☐ Program: leave blank

☐ Class: 1080

☐ Project: leave blank

☐ Amount: **enter the Amount Approved total** *minus \$1.00* (from line 1)

### File upload

**Files needed to support your reimbursement request are:**

- [SJSU Travel Claim Worksheet - No Overnight](#) - use a pdf copy of the worksheet.
- **NEW** - TRAVEL DATES - enter the 1st and last day of the month traveled
- Shorten the file name without using any special characters.
- Add completed worksheet into FTS claim as the Document Type - "Daily Expenses".
- Site visit maps - pdf files are best. Add your Map file/s into FTS claim as the Document Type - "BackUp Document".

**Upload Attachments** - Click after adding each document or after adding all the documents

### Save:

- The Travel Reimbursement must be saved before you can submit it.
- You can Save your form and add additional trips to it throughout the semester.

### 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).

Contact Marie with any questions: email: [marie.kochevar@sjsu.edu](mailto:marie.kochevar@sjsu.edu), phone: 408-924-3754 or SH305.

If you need additional assistance pertaining to Finance policies and processes, you can contact [Finance Connect](#) for help by emailing [financeconnect@sjsu.edu](mailto:financeconnect@sjsu.edu) or calling 408-924-1558.