Supervision Travel Process

Added 10/30/2024 - SJSU Travel Guide 2025

Purpose - <u>for employees who drive on university business and want to be reimbursed for the mileage expenses.</u>

Steps 1, 2 and 3 are required to be on file in the Teacher Ed Dept. before Step 4 - a mileage reimbursement claim can be submitted.

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.

<u>NEW as of 11/14/2022</u> - The Defensive Driving Course requires registration prior to starting the course. Complete the following form to request the <u>Defensive Driving course</u>.

It asks for the class you like to take, choose Defensive Driving.

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

Complete the <u>Defensive Driving Fundamentals</u> online course in CSU Learn. For details, go to the "<u>Driving on University Business</u>" page of the SJSU <u>Finance and Business Services</u> website. From <u>CSU Learn</u>, hit START, then Search for <u>Defensive Driving</u> 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

The Blanket Travel Authorization form is an authorization for <u>mileage or parking purposes only</u>. A new Blanket Authorization is required for each new academic year.

Go to one.sisu.edu.

Log in. Search for Financial Transaction services (FTS) and open it.

Find the Travel section. You'll see 2 available forms - Travel Authorization and Travel Reimbursement.

The Blanket Authorization form is created using the Travel Authorization form. The + icon will open a new

blank form. The size used to find previous forms you have submitted.

<u>The Departure & Return Dates for the new academic year. For AY 2025-26, the Departure Date is 8/18/2025, Return Date is 5/22/2026.</u>

Continuing faculty - To submit a new form, You can 1) Clone a prior years form. Using the you can find a prior years form. Open the prior years form, scroll to the bottom and click on Clone. A new form will open. The Status will say OPEN. Use this as a starting point for a new form. You'll need to update the dates. See the screenshot example below. When reviewed, Click on Save, then Submit.

To add a blank form - click on the ticon to add a blank authorization form. Use the screenshot example for the appropriate information.

New faculty - To add a form, click on the + icon to add a blank authorization form. Use the screenshot example for the appropriate information.

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 1st and June 30th) 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 <u>Blanket Travel Authorization screenshot</u> 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. <u>When approved, make note of the TR #000000 as you will need to reference this # on the mileage claims below.</u>

STEPs 1, 2 and 3 must be completed prior to submitting a Travel Reimbursement Claim (STEP 4)

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 <u>Financial Transcation Services (FTS)</u>.

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 Form

HEADER Section

Note the following:

Status: (assigned by the system) Traveler's University Affiliation:

Faculty

UPDATE - Travel dates: enter dates for the month traveled, eg. August 2025

Departure Date: use 8/18/2025
Return Date: use 8/31/2025

Destination:

- Country United States
- State California
- City Enter city or cities 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 space:

• enter this statement here: AY 2025-26 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 <u>SJSU Travel Claim Worksheet - No Overnight</u>, 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 #)

Travel Start: 1st day of the month traveled **Travel End Date:** Last day of the month traveled

Location (Site of Visit) lines: 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 400 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 \$0.70 (as of 1/1/2025)
- Need more lines? Save worksheet as "1 of 2" and start a 2nd worksheet, call it "2 of 2". In each worksheet, above the Daily Expense Total, add to the cell above, "worksheet 1 of 2" or worksheet 2 of 2" respectively.
- Note the Daily Expense Total in Cell XY 10,11,12. 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 ch	art field lines, Line 1 and Line 2
• Lir	ne #1:
	☐ Account: 606001
	☐ Fund: 70000
	☐ DeptID: 1368 [Teacher Ed Dept.]
	☐ Program: leave blank
	☐ Class: 1080
	☐ Project: leave blank
	☐ Amount: \$1.00 (change the amount to \$1.00)
 Click on to add a 	second line
• Lir	ne #2:
	☐ Account: 606001
	☐ Fund: 70000
	☐ DeptID: 1176 [LCOE Dean's Office]
	☐ Program: leave blank
	☐ Class: 1080
	☐ Project: leave blank
	☐ Amount: enter the Amount Approved total minus \$1.00

File upload

Files needed to support your reimbursement request are:

- SJSU Travel Claim Worksheet No Overnight use a pdf copy of the worksheet.
 - o 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".

(from line 1)

<u>Site maps</u> - Create a site map/s from a maps program showing the shortest trip from either your

home or SJSU for each site that you visit. For SJSU use the address 400 E Salvador Street, SJ 95112 to find the distance to your site from SJSU.

- Single Site Visit Entered on 1 line on the Daily Worksheet. Save a screenshot of each map as a pdf and use a file name like - SJSU to Campbell M School.
- Multiple Site Trips travel involving more than 1 site in one continuous trip, now require a separate map showing the starting point, to Site 1, to Site 2, etc. and return. Enter this trip on one line, do not break up the trip to 2 lines. The map should show the starting point, to Site 1, to Site 2, etc. and return. Enter this trip on one line, do not break up the trip to 2 lines.
- 2 Single Site Trips on the same day 2 separate visits on the same day, eg, one in the morning and then another in the afternoon. These trips would require 2 lines. Two maps required, one for each trip.
- Add Map file/s into each FTS claim as the Document Type "BackUp Document".

Upload Attachments - Click the **t** after adding each document line to add more files.

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).

If there are any errors in the forms at either the SAVE or SUBMIT steps, you will see those highlighted at the top of the form. Correct those and re-save or submit.

Once submitted, I will be notified. I will review your form for accuracy. You may receive it RETURNED for error correction. Once its correct I will VERIFY it, this action moves it forward for approvals and payment.

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

If you need additional assistance pertaining to Finance policies and processes, you can contact <u>Finance Connect</u> for help by emailing <u>financeconnect@sjsu.edu</u> or calling 408-924-1558.

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