


Travel Overview


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Travel Overview - Objectives

- General principles governing travel
- Review of the Statewide Travel Management System (STMS)
- Adding, removing, and updating employee information
- Profiles in STMS
- Public records requests
- Adding a conference reimbursement

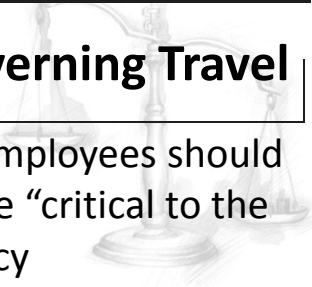


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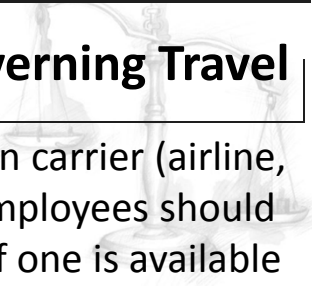
General Principles Governing Travel

- Travel activities for state employees should be limited to those that are “critical to the mission” of the state agency
- It is generally expected that the most economical means of transportation and the most direct route should be used when traveling on state business
- However, there are instances when this is not required




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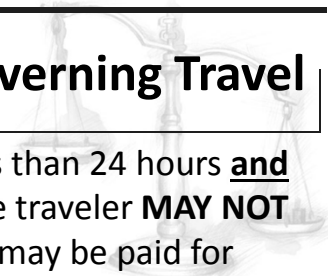
General Principles Governing Travel

- When traveling by common carrier (airline, train, car rental) agency employees should use a state term contract if one is available for the common carrier
- Avis is the state term contractor for renting vehicles and should be utilized if a car rental is needed when traveling on state business




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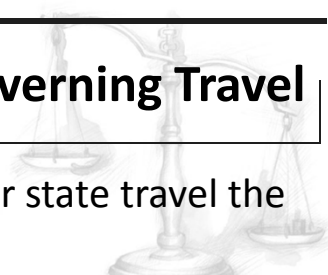
General Principles Governing Travel

- If a trip for any traveler is less than 24 hours **and** there is no overnight stay, the traveler **MAY NOT be paid for meals**. He or she may be paid for mileage or other incidental expenses such as fuel, tolls, parking fees, etc., but **not** for **meals**
- This is considered “Class C” travel and is not permitted except in very specific circumstances, that is, when travelers are working in an emergency/disaster situation, when a state of emergency has been declared by the Governor




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General Principles Governing Travel

- When renting a vehicle for state travel the agency should use Avis
- Renting any vehicle besides compact and economy requires justification
 - Example: JAC rented mini vans to attend this conference. It was justifiable due to multiple people traveling and equipment needed to be transported, saving the state money.



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General Principles Governing Travel

- Class A Travel – continuous travel of 24 hours or more away from official headquarters. The travel day for Class A is based on a calendar day (midnight to midnight)
- Class B Travel – continuous travel of less than 24 hours which involves overnight absence away from official headquarters. The travel day for Class B travel begins at the same time as the travel period
- Class C Travel – short or day trips in which the traveler is not away from his/her official headquarters overnight. *Class C travel payments are NOT authorized to be paid at this time.*

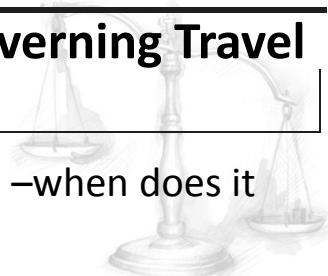


General Principles Governing Travel

- When an employee is traveling to training/conference or convention an authorization to incur travel is required
- The authorization is created in the STMS
- Any advanced purchases for this travel paid with a P-Card should have the STMS master trip number in P-Card Works

Description
Registration fee for NDIA 2022 - STMS 000025415


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General Principles Governing Travel - \$175 Room Rate

- \$175 room rate limitation –when does it apply?
 - Meetings, conferences, or conventions **organized by your office**
 - Your office has “control” over booking/choosing the room
 - Recruitment activities
 - Other operational-type meetings

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General Principles Governing Travel - \$175 Room Rate

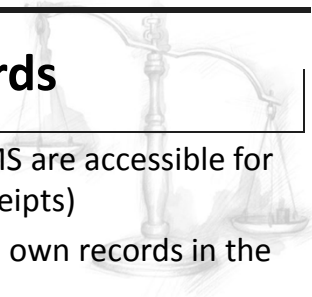
- \$175 room rate limitation – **exemptions**
 - Officers’ travel (appointed or elected officials*)
 - Attending a conference not organized by your office
 - Investigation activities
 - Litigation activities
 - Law enforcement activities
 - Non-employees (e.g., witnesses)

• Officer or public officer—An individual who in the performance of his or her official duties is vested by law with sovereign powers of government and who is either elected by the people, or commissioned by the Governor and has jurisdiction extending throughout the state, or any person lawfully serving instead of either of the foregoing two classes of individuals as initial designee or successor (s. 112.061, F.S.)

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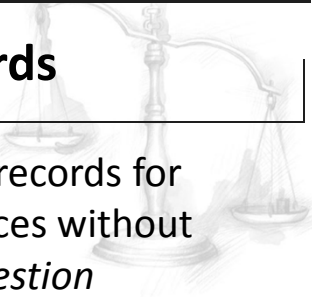
STMS and Public Records

- Travel records housed in the STMS are accessible for at least five years (forms and receipts)
- Each office will have access to its own records in the STMS for at least five years
- JAC will also have access to records in the STMS (*JAC is the system administrator for all offices under Justice Administration and the fiscal accountant for most offices*) for at least five years
- Department of Management Services (DMS) is the “owner” of the STMS and will have access to all records for at least five years




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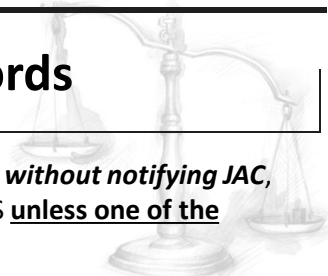
STMS and Public Records

- JAC ***will not*** release STMS records for Justice Administration offices without *contacting the office in question*
 - Following JAC’s current public records policy
- DMS ***will release records*** without contacting JAC or your office; except under certain circumstances




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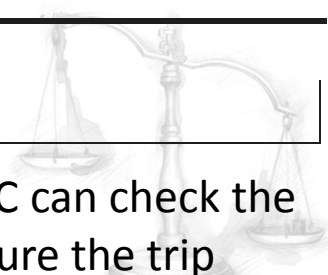
STMS and Public Records

- **DMS will release** documents or data, **without notifying JAC**, related to a public record in the STMS **unless one of the following conditions exists:**
 - An employee is identified as “restricted relative” or “protected identity” in People First (as defined by s. 119.071, F.S., or other authority); or
 - A trip is marked “secure” in the STMS – by manually checking a “Secured Record” box. Offices will be expected to provide a citation in the STMS (within that trip) supporting the authority to mark a trip secure based on Florida law
 - Only Approvers may mark trips secure in the STMS




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Securing a Trip

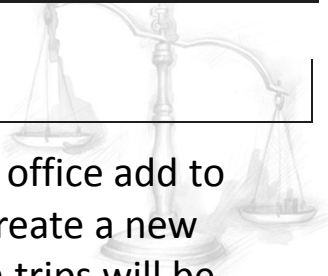
- Only Approvers and JAC can check the box in the STMS to secure the trip
- If the trip is secured, the trip will not show up on DMS’s public website
- Secured trips should only be case-related trips

SECURED RECORD 




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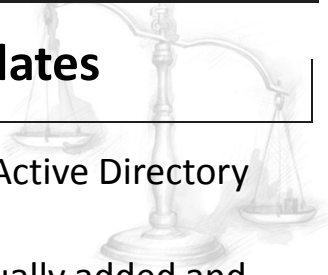
Policy - Suggestions

- It is encouraged that each office add to their current policies, or create a new policy, to document which trips will be marked secure in the STMS and the statutory authority for marking a trip secure (Florida Statutes, case law, or both)
- If questioned about marking trips secure, the policy will provide the authority and reasoning for the action




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STMS – Employee Updates

- JAC has created a Microsoft Active Directory for all STMS users
- All travelers need to be manually added and removed by JAC's IT department
- JAC's *Add Employees Form* should be submitted via email to STMS@justiceadmin.org
- This form is available on the Accounting section of JAC's website



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STMS – Add Employee Form

Justice Administrative Commission - Statewide Travel Management System - Add Employees Request Form

Employees to be Added to the STMS:

Name	Profile	Default Org Code	EO	Email	People First Logon ID (6 or 7 digits)	Approver	HQ City
Last Name, First Name		21 #####		name@office.com	#####	Last Name, First Name	City

Authorized by: _____
Date: _____

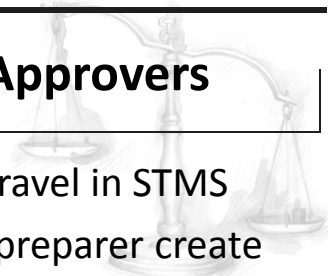


STMS – Removing Employees / Updating

- When an employee leaves your office, please contact JAC STMS so they will be removed
 - Send an email to STMS@justiceadmin.org with the employees name and email address
- If an employee’s name changes, JAC needs this information
 - Name and email currently in the system
 - New name and email if it changed
- All other changes can be submitted via email




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STMS – Profiles Non-Approvers

- Traveler – Prepares own travel in STMS
 - This profile can have a preparer create their trips, they will have to login to approve
- Proxy Traveler – never logs in the STMS
- Preparer – Prepares travel for themselves and others




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STMS – Profiles Approvers

- Agency head / delegate – Approves all documents for employees other than his/her self
 - Every JRO needs an agency head in the STMS. They are the only profile that can approve authorizations
- Self Approver – Approve all documents for employees including his/her own

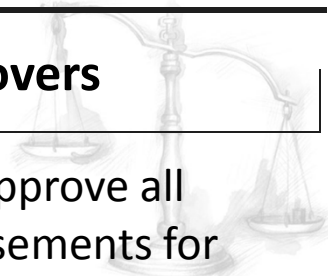



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STMS – Profiles Approvers

- Payment Approver – Approve all advances and reimbursements for employees other than his/her own
- Reviewer – Reviews trips with no ability to approve a reimbursement



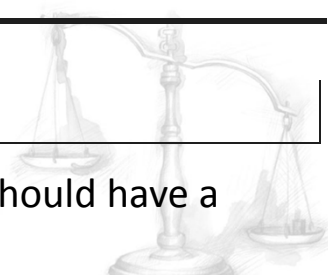



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STMS – Approver

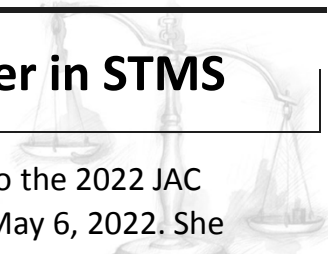
- Approvers in your office should have a delegate set up
- A delegate can approve travel for the approver if he/she is out of the office
- In settings you can add a delegate
 - Settings -> Approver Settings -> Choose another approver in your office as your delegate





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Conference Trip – Enter in STMS

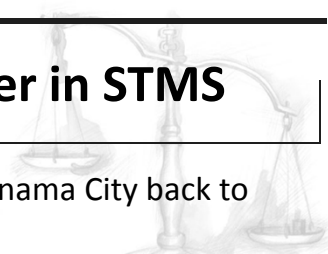
- Jennifer Smith is excited to go to the 2022 JAC Conference from May 2, 2022 to May 6, 2022. She leaves her home in Tallahassee in her personal vehicle at 5:00 p.m. on May 1, 2022. Her hotel stay during the conference will be charged to her purchasing card (Pcard). Jane also had room service charged to Pcard. Instead of returning on May 6th, Jane took an extra day with some family and friends and return to Tallahassee on Saturday at 5:00 p.m.

Continues on next slide.....




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Conference Trip – Enter in STMS

- Tallahassee to Panama City – Panama City back to Tallahassee
- JAC conference from May 2nd – 6th
- Hotel on Pcard \$165.00/night with local fees
- Room service charges erroneously charged to Pcard: 32.00
- FDOT Mileage: 120 Roundtrip = 240
- Personal day on Friday after the conference ended



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STMS – Creating an Authorization

New Trip Form

Select a record type

- Authorization
Form used to acquire approval for upcoming travel
- Reimbursement with General Authorization
Form used for requesting reimbursement for travel that did not require an Authorization Form to be completed.

Cancel Next

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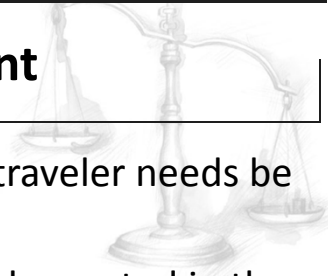
STMS – Creating an Authorization

<u>* POINT OF ORIGIN</u>	Tallahassee	<u>* TRIP INCLUDES OFF DUTY TIME</u>	Yes
<u>* DESTINATION</u>	Panama City	<u>OFF DUTY TIME BEGINS</u>	5/6/2022 12:00 PM
<u>* DEPARTURE DATE AND TIME</u>	5/1/2022 5:00 PM	<u>OFF DUTY TIME ENDS</u>	5/7/2022 3:00 PM
<u>* RETURN DATE AND TIME</u>	5/7/2022 5:00 PM	<u>CASE #</u>	
<u>* PRIMARY MODE OF TRANSPORTATION</u>	Personal Vehicle	<u>CIRCUIT #</u>	
<u>* TYPE OF TRAVEL</u>	In State	<u>UNIT #</u>	
<u>* MISSION CRITICAL STATEMENT</u>	Sample Mission Critical Statement 1	<u>PROJECT ID</u>	
<u>* PURPOSE OF TRAVEL</u>	Conference or Convention	BATCH	
<u>BENEFIT TO STATE</u>	JAC is providing training to our Judicial Related Offices (JROs) which is part of our mission critical functions.	EXTERNAL OBJECT CODE (EOB)	
<u>COMMENT</u>		OTHER COST ACCUMULATOR (OCA)	
<u>* WAS TELECOMMUNICATION</u>	Yes	CATEGORY	
		YEAR	
		GRANT ID	
		FUND ID	

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STMS - Reimbursement



- After the conference the traveler needs be reimbursed for the trip
- The authorization is already created in the STMS
- The preparer can pull up the authorization
- The STMS gives you the option to change the travel times and destinations if needed.



STMS - Reimbursement



TRIP DETAILS

* POINT OF ORIGIN @	Tallahassee	* TRIP INCLUDES OFF DUTY TIME @	Yes
* DESTINATION @	Panama City	OFF DUTY TIME BEGINS @	5/6/2022 12:00 PM
* DEPARTURE DATE AND TIME @	5/1/2022 5:00 PM	OFF DUTY TIME ENDS @	5/7/2022 3:00 PM
* RETURN DATE AND TIME @	5/7/2022 5:00 PM	CASE # @	
* PRIMARY MODE OF TRANSPORTATION	Personal Vehicle	CIRCUIT # @	
* TYPE OF TRAVEL @	In State	UNIT # @	
* MISSION CRITICAL STATEMENT	Sample Mission Critical Statement 1	PROJECT ID @	
* PURPOSE OF TRAVEL @	Conference or Convention	BATCH	
COMMENT @		EXTERNAL OBJECT CODE (EOB)	
		OTHER COST ACCUMULATOR (OCA)	
		CATEGORY	


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STMS – Reimbursement

Chatter Feed Details Expense Line Items **Trip Forms** Attachments

[New Advance](#) [New Reimbursement](#)

FORM ID ▲	RECORD TYPE	STATUS	* PURPOSE OF TRAVEL	* DESTINATION	* DEPARTURE DATE AND TIME	* RETURN DATE AND TIME
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STMS – Reimbursement


[Return to Trip Form](#) [New Expense Line Item](#) [Edit](#) [Clone](#) [Delete](#)

- DETAILS

MASTER TRIP INVOICE NUMBER	000005665	EXPENSE DATE @	5/2/2022
FORM ID @	7398	TOTAL AMOUNT	\$106.80
RECORD TYPE ID	Mileage Map	UNALLOWABLE AMOUNT	\$0.00
ORGANIZATION CODE @	2130000000	TOTAL ALLOWABLE AMOUNT	\$106.80
EXPANSION OPTION @	B2	COMMENT @	
EXPANSION OPTION VERSION @	05		
PROJECT ID			

- TRAVEL DETAILS



POINT OF ORIGIN @	Tallahassee	REIMBURSEMENT RATE TYPE @	Florida
DESTINATION @	Panama City	MILEAGE REIMBURSEMENT RATE @	
MILEAGE @	240.00	View Map Calculator	

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STMS – Receipts

- Copies of Receipts
 - Hotel Bills
 - Car Rental
 - Airfare
 - Cab or Transportation Fees
 - Toll Receipts
 - Gas Receipts
 - Incidentals (travel-related only)
 - baggage fees, fax charges, photocopies, etc.


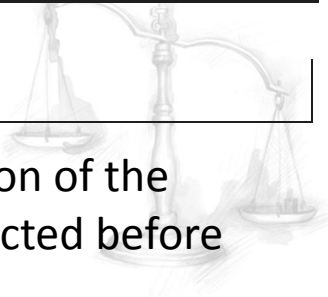


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STMS – Receipts


- Any personal information of the traveler should be redacted before being uploaded
 - Home address, credit card numbers, etc.
- All of the backup should be uploaded to the STMS as one PDF file



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Questions



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Contact Information

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