TRAVEL GUIDELINES

Travel is performed and reimbursed as provided by Florida Statutes Section 1010.04 and 112.061; Florida Administrative Code Rule 6A-1.056, the Florida Attorney General article AGO 81-53 and the St. Johns County School District Board Rule 7.17.

The Florida State Statutes establish the guidelines; however, it is the responsibility of each traveler to comply within these guidelines. The statute requires each traveler use the most economical means of travel; therefore, travel should be carefully planned in advance to ensure the most economical and efficient methods of transportation are used.

Travelers shall be reimbursed for travel expenses pursuant to Section 112.061, F.S. Travelers shall ensure that their school/department has sufficient funds to cover travel expenses. Except for meals and certain incidental expenses, travelers must retain and submit receipts and other documentation necessary to obtain reimbursement (i.e. hotel, rental car, tolls, parking, etc.).

All travel must be authorized and pre-approved by the traveler’s supervisor by submitting the Travel Request webform in Sungard Business Plus (see Travel Authorization). The appropriate approvals must be made before any expenses are incurred, even when using the district Purchasing Card.

Seat belt use is mandatory while on travel status, regardless of whether the vehicle is a county owned vehicle, privately owned vehicle, or a rented vehicle. Failure to use a seat belt may be considered an improper use of a vehicle and may subject the traveler to disciplinary action. If an accident resulting in injury occurs and failure to use the seat belt contributed to the injuries, workers’ compensation benefits may be reduced under the provisions of Section 440.09(4), F.S.

Safe use of cellular phones is of the utmost importance. Under no circumstances are employees allowed to place themselves or others at risk while using cellular phones in furtherance of fulfilling District business. The employee is personally responsible for complying with all local, state and federal laws regarding the use of cellular phones and other communication devices while driving.

Expenses incurred while traveling to any type of athletic event must be paid with your internal funds.
Definitions

**Agency Head:** The highest policymaking authority of a public agency.

**Class A Travel:** Out-of-County Travel; Continuous travel of 24 hours or more away from official headquarters. The travel day for this class of travel shall be a calendar day (midnight to midnight).

**Class B Travel:** Out-of-County Travel; Continuous travel of less than 24 hours that involves overnight absence from official headquarters.

**Class C Travel:** Local Travel; Travel for short or day trips where the traveler is not away from his or her official headquarters overnight.

**Incidental Expenses:** Other reimbursable expenses related to official travel as pursuant to Section 69I-42.010, Florida Administrative Code, such as taxi fares, parking fees, tolls, communication expenses, tips, etc.

**Most Economical Class of Transportation:** The class having the lowest available fare.

**Most Economical Method of Travel:** The mode of transportation; county owned vehicle, privately owned vehicle, common carrier, etc., designated by an agency head pursuant to Section 112.061, F.S. The agency head should designate the most economical method of travel for each trip considering the following: the nature of the business, the most efficient and economical means of travel (considering time of the traveler, cost of transportation and per diem or subsistence required), and the number of persons making the trip.

**Official Headquarters:** The official headquarters is normally the same city or town as that of the office to which the employee is assigned. For an employee located in the field where there is no established office, the headquarters will be the city or town nearest to the area where the majority of the employee’s work is performed, or such other city, town or other area as may be designated by the agency head. In all cases of such designations, the location must be in the best interest of the agency and is not determined based upon the convenience of the employee. Board Members may declare their Official Headquarters as their place of residence.

**Per Diem:** Daily allowance for expenses incurred while traveling on official state business.

**Travel Day:** A period of 24 hours consisting of four quarters of six hours each.

**Traveler:** An employee or other authorized person performing authorized travel.

**Vicinity Miles:** Miles incurred on official state business when travel is within the vicinity of official headquarters or the city limits of the city traveled.
**Pre-Travel Planning**

It is the responsibility of each traveler to plan travel arrangements in advance, to ensure that the travel is within budget and that the most economical and efficient methods are utilized. Generally, there will be a greater selection of travel times available and the traveler will get lower airline rates by making reservations at a minimum of 14 days prior to travel.

Class A and B travelers are allowed a per diem rate of $80 per day or the actual costs of lodging plus meal allowances, whichever is greater. Travelers should request the single occupancy government rate for hotel or motel rooms, if claiming the actual cost of the room instead of per diem. Authorized travelers are reminded that obtaining economical hotel accommodations is a priority for in-state and out-of-state travel. Travelers should be prepared to justify situations where hotel costs appear excessive for the geographic areas in which the traveler is staying. In determining whether a hotel rate is excessive, consideration should be given to geographic area, seasonal fluctuations, and distance from the intended assignment location.

Class C travelers, those taking trips in a single day, are paid for transportation (common carrier, rental car, or mileage) and reimbursable incidental expenses. Class C travelers are not eligible for reimbursement for per diem or a meal allowance.

Travelers are required to travel by utilizing the most efficient route, employing the most economical and efficient method of transportation, and requesting standard accommodations. If a more expensive route, method of transportation or accommodation is selected for personal convenience, reimbursement will be based on the lesser of the actual total expense.

**Travel Authorization**

A traveler must be approved, in advance, to attend a conference or convention. All Class A & Class B travel requests must be submitted via the Travel Request webform in Sungard Business Plus. The Travel Request webform must be submitted regardless of whether or not the traveler is being reimbursed for out-of-pocket expenses. The school/department must have sufficient funds prior to submitting the Travel Request webform. Once submitted, the Travel Request webform will go through the proper authorization based on the traveler’s supervisor and the department head of the funding source. The appropriate approvals must be made before any expenses are incurred, including any expenses charged to a Purchasing Card. Once the Travel Request is approved, a Purchase Order is issued encumbering the reimbursable amount for the trip.

If other expenses are incurred during Class C travel, the traveler must submit a Travel Request form in advance in order to document appropriate approval of the travel.
Incidental Travel Expenses

The following travel expenses may be reimbursed. A receipt showing proof of payment must be submitted with your travel reimbursement request.

- Taxi fare
- Ferry fares; bridge, road & tunnel tolls
- Parking fees- lowest price option
- Communication expenses- business calls, internet access, etc.
- Tips- **Florida Administrative Code Rule 6A-1.056**: Reasonable tips and gratuities may be reimbursed for actual tips paid to taxi drivers (not to exceed 15% of the fare), actual tips for mandatory valet parking (not to exceed $1 per occasion), and actual tips paid for portage of baggage (not to exceed $1 per bag and not to exceed $5 total per incident). Tips for meals are not reimbursable.

Purchasing Card

Refer to the Purchasing Card User’s Guide for guidelines when using the Purchasing Card for travel related expenses.

Registration Fees

No public funds shall be expended for attendance at conferences or conventions unless the main purpose of the conference or convention provides a direct educational or other benefit supporting the work and public purpose of the person attending.

A registration fee can be paid with the district Purchasing Card, Purchase Order or by the traveler. When claiming reimbursement for registration fees, the traveler must submit a receipt or proof of purchase with their Travel Reimbursement Request (See Travel Reimbursement).

Reimbursement for individual memberships to organizations can be made from the “approved membership list” posted on the SJCSD intranet, “Inside SJCSD”. If a membership is not on the list, contact the Supervisor of Accounts Payable and the Chief Financial Officer for approval.
Transportation

Travelers may use a common carrier, county owned vehicle, privately owned vehicle, or a rented vehicle for transportation. Whether the traveler chooses one or a combination of modes of transportation, the traveler must use the most economical travel route and the most economical and efficient travel method.

**Airline Tickets**

Airfare may be deemed appropriate when it is proven to be the most economical or time efficient means of travel.

Airline travel shall be “coach class” accommodations only. First class accommodations are not authorized and will result in reimbursement of expenses at the lower “coach” rate.

Travelers should remember airline tickets are generally non-refundable. Tickets can sometimes be modified or transferred to another ticket for the same traveler for a different date. The fee and any additional charges or increased costs are the responsibility of the traveler unless they are making the change at the request of the traveler’s supervisor or with prior written approval.

The district will reimburse travelers for fees for one piece of luggage. Any charges for additional or oversized bags will be the traveler’s responsibility and will not be reimbursed.

**County Owned Vehicles**

The District Office has multiple vehicles available for District Office staff (this includes District Office staff at 40 Orange Street, Yates Building, Fullerwood Building, and other District Office locations as appropriate) for School Board business. To request the use of a District Office vehicle, complete the form **Vehicle Use Request Form REV June 2015** located on the SJCSD intranet, “Inside SJCSD”, under “Operational Services”.

**Privately Owned Vehicles**

Travelers may use their privately owned vehicle and when doing so will be reimbursed for authorized business travel. Travelers using a privately owned vehicle will be reimbursed on a mile for mile basis at $0.50 per mile.

**Rental Car**

According to Florida state statute 110.04, the Florida state contract for rental vehicles must be reviewed to determine if the contractual rates are in the school board's economic advantage. To review the current contractual rates provided to the state of Florida visit [www.dms.myflorida.com/contract_search](http://www.dms.myflorida.com/contract_search) and search for “Rental Vehicles”.

If it is determined that the state contract is not the most economical, the traveler may reserve a rental car with another provider.
SUBSISTENCE

Class A & B Travel: Out-of-County Travel

Out-of-County travel includes any travel related expenses outside the following counties: Clay, Duval, Flagler, Putnam & St. Johns

Travel Reimbursement requests may be claimed in one of two ways: (1) Standard Method or (2) Per Diem

(1) Standard Method: Meals Plus Lodging

**Mileage** $0.50 per mile
- **Florida state statute 112.061:** All travel must be by a usually traveled route. In case a person travels by an indirect route for his or her own convenience, any extra costs shall be borne by the traveler.
- When travel begins from the employee’s place of residence on a scheduled workday, mileage must be calculated from the location that is closest to the final destination, whether it be from the employee’s place of residence or their official headquarters.
- When traveling on a non-scheduled workday (i.e. weekends/ summers), mileage can be calculated from the employee’s place of residence.
- **Florida state statute 112.061:** Vicinity mileage necessary for the conduct of official business is allowable but must be shown as a separate item on the expense voucher. All other vicinity mileage is at the expense of the traveler.
- Proof of mileage (i.e. Mapquest) must be submitted with reimbursement request for all non-local & vicinity miles.

**Lodging** Lodging expenses may be claimed by providing an itemized receipt for the hotel/motel.
- Prior to traveling, it is the traveler’s responsibility to contact the hotel to verify what payment methods and/or documentation are required in order to receive a tax exempt rate. This only applies to hotels in the state of Florida. Any Florida state sales tax will not be reimbursed to employees.
- Due to security and liability purposes, lodging must be at a hotel/motel. House/condo rentals are prohibited.
Meals

Florida state statute: No one shall be reimbursed for any meal or lodging included in a convention or conference registration fee paid by the state.

Meal reimbursements are not permitted based on dietary preferences and/or restrictions.

Current Florida State Statute 112.061 Rates:
- **Breakfast** - $6.00 for travel that begins *before* 6 am and extends *beyond* 8 am
  - According to the Florida Attorney General article AGO 81-53, a “continental” breakfast is considered a meal within the State Statute 112.061. Furthermore, as provided by Attorney General opinion 81-22, the definition of a continental breakfast consists of bread and a hot beverage (ex: croissants and coffee)
- **Lunch** - $11.00 for travel that begins *before* 12 noon and extends *beyond* 2 pm
- **Dinner** - $19.00 for travel that begins *before* 6 pm and extends *beyond* 8 pm

(2) **Per Diem Method**

**Per Diem** Current Florida State Statute 112.061 Rate: Flat rate of $80.00 per day (includes cost of hotel/motel and meals)

Per Diem divides the day into four 6 hour blocks:
- Block 1 – 12 midnight to 6 am
- Block 2 – 6 am to 12 noon
- Block 3 – 12 noon to 6 pm
- Block 4 – 6 pm to 12 midnight
Class C Travel - Local Travel

Local travel includes reimbursement for **mileage only** for the following counties: Clay, Duval, Flagler, Putnam & St. Johns

**Mileage**

$0.50 per mile

- **Excess Mileage**: If reporting to a different location, you are only entitled to claim the miles in excess of your regularly traveled route. See “How to Calculate Excess Local Travel Mileage” documentation for additional information.

- When travel begins from the employee’s place of residence on a scheduled workday, mileage must be calculated from the location that is closest to the final destination, whether it be from the employee’s place of residence or their official headquarters.

- When traveling on a non-scheduled workday (i.e. weekends/ summers), mileage can be calculated from the employee’s place of residence.

**Meals**

- Not an allowable expense for local travel

**Other Expenses**

- If other expenses (registration, tolls, etc.) are incurred for local travel in addition to mileage, the traveler must submit a Travel Request form in advance in order to document appropriate approval of travel.
TRAVEL REIMBURSEMENT

Class A & B Travel: Out-of-County Travel

The traveler must submit the Travel Reimbursement Request webform in Sungard Business Plus no later than two weeks after travel is completed, except for the month of June. For the month of June, a reimbursement request must adhere to the cutoff date(s) provided in the year end memo. If a reimbursement is not completed within this time frame, the travel purchase order may be cancelled and funds will no longer be available.

**Agenda:** An agenda is required for ALL Class A & B Out-of-County Travel reimbursement requests. The agenda must be scanned and submitted as an attachment on the Travel Reimbursement Request webform in Sungard Business Plus. If an agenda was not provided, other documentation must be submitted.

**Expense Overage:** If the reimbursable travel related expenses are over the original travel purchase order amount, the reason for this overage must be noted in the “Notes/Reason for Expense Overage” section of the Travel Reimbursement webform in Sungard Business Plus. Once the Travel Reimbursement webform is submitted, it will be routed back through the original approval process authorization.

**Lodging:** Lodging expenses may be reimbursed by submitting an itemized receipt provided by the hotel/motel. Florida state sales tax is not a reimbursable item. All other taxes (i.e., bed tax, county tax, parking tax, etc.) are reimbursable.

**Meals:** An agenda is required for reimbursement of meals. If an agenda is not provided, other documentation must be submitted. Receipts are not required for meal reimbursements. Meal reimbursements are not permitted based on dietary preferences and/or restrictions.

**Mileage Documentation:** Mileage documentation (i.e. Mapquest, Google maps directions) must be submitted as an attachment for all mileage reimbursement requests. This includes vicinity miles as well. Vicinity mileage must be shown as a separate expense item on the Travel Reimbursement webform.

**Receipts:** All reimbursable travel related expenses must have an itemized receipt scanned in as an attachment on the Travel Reimbursement Request webform in Sungard Business Plus. This excludes receipts for meals. Travel expenses that are not supported by receipts will not be reimbursed unless the traveler can provide a reasonable explanation as to why the receipt cannot be provided. It is the traveler’s responsibility to obtain and provide receipts for all travel related expenses.
Class C Travel- Local Travel

The traveler must submit the Local Travel Reimbursement webform in Sungard Business Plus monthly, within two weeks of the last day of the month when travel occurred, except for the month of June. For the month of June, a reimbursement request must adhere to the cutoff date(s) provided in the year end memo. Reimbursements submitted outside these guidelines will be denied unless there are extenuating circumstances.