

YOUTH SERVICES

Policy Title: Travel Next Annual Review Date: 10/13/2017	Type: A. Administrative Sub Type: 3. Fiscal Number: A.3.2
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References: Louisiana Administrative Code, Title 4, Part V, Chapter 15 (PPM 49); ACA Standards 2-CO-1B-11 (Administration of Correctional Agencies), 4-JCF-6B-15 (Performance-Based Standards for Juvenile Correctional Facilities); and YS Policy Nos. A.1.9 "Records Management and Retention", A.1.19 "Ebola Virus Disease (EVD)", A.2.48 "Driver Safety Program", A.3.8 "Budget and Fiscal Management Activities", and A.3.16 "State Corporate Travel Card"	
STATUS: Approved	
Approved By: <i>James Bueche, Deputy Secretary</i>	Date of Approval: 10/13/2016

I. AUTHORITY:

Deputy Secretary of Youth Services (YS) as contained in La. R.S. 36:405. Deviation from this policy must be approved by the Deputy Secretary.

II. PURPOSE:

To establish the Division of Administration's Policy and Procedure Memorandum (PPM) No. 49 as a YS' policy, and to provide specific instructions concerning state travel.

III. APPLICABILITY:

All employees of YS.

The Assistant Secretary, Undersecretary, Deputy Undersecretary, Chief of Operations, Deputy Assistant Secretary, Regional Directors, Facility Directors and Regional Managers are responsible for ensuring that all necessary procedures are in place to comply with the provisions of this policy.

IV. DEFINITIONS:

Authorized Persons – The Undersecretary/designee is allowed to deem persons as an authorized traveler for official state business only.

Department of Public Safety – Services, offices and officers of Public Safety Services, a.k.a. Department of Public Safety.

“Acknowledgement of NSE (Non-State Employees) Utilizing a State Vehicle” Form - A legal arrangement in which one party agrees to hold the other party free from responsibility for any liability or damage caused to the first party that might arise out of the other party's implementation of a contract.

In-State Travel - All travel within the borders of Louisiana or travel through adjacent states between points within Louisiana when such is the most efficient route.

Out-of-State Travel - All travel to any of the other 49 states plus District of Columbia, Puerto Rico, Virgin Islands, American Samoa, Guam, and Saipan. (YS Policy No. A.1.19 was established to create a formal policy relative to employees who travel to nations in which the Centers for Disease Control and Prevention (CDC) has issued a travel alert or warning due to the Ebola Virus Disease (EVD).)

Receipts/Document Requirements – Supporting documentation, including original receipts, must be retained according to record retention laws. (Refer to YS Policy No. A.1.9)

State Corporate Travel Card – Credit cards issued in a State of Louisiana employee's name to be used for specific, higher cost official business and expenses (refer to YS Policy No. A.3.16).

V. POLICY:

It is the Deputy Secretary's policy that all travel must be in accordance with PPM No. 49, the "Louisiana State Travel Guide", as updated (see attachments of the travel guide and pocket guide), and that control over all financial management aspects and fiscal management activities shall be maintained (refer to YS Policy No. A.3.8). For further information refer to Louisiana Office of State Purchasing and Travel website @ <http://www.doa.louisiana.gov/osp/travel/traveloffice.htm>.

Except in emergency situations, any waivers to PPM 49 must receive prior approval from the Commissioner of Administration.

VI. TRAVEL AUTHORIZATION:

- A. All work-related travel must be authorized and approved in writing by the employee's immediate supervisor at Central Office, or in the case of field offices and secure care facilities, the Regional Manager or Facility Director, prior to travel, utilizing the attached "Travel Authorization" form [GF-4(TA) Rev. 01/2013].
- B. Except for youth transport, emergencies and routine travel with in-state destinations that can be most efficiently accomplished by traveling through Mississippi, all out-of-state travel must have prior approval of the Undersecretary (refer to Section VII. C. below).
- C. Any employee who is authorized to drive a vehicle on state business must complete the "Louisiana Defensive Driving Course" at least once every three (3) years, and complete an "Authorization and Driving History Form" (DA 2054), pursuant to the guidelines outlined in YS Policy A.2.48.

All YS employees authorized to drive state vehicles are also authorized to drive rental vehicles after all rental vehicle requirements are met in accordance with PPM No. 49.

- D. Any persons who are not official state employees must sign an “Acknowledgement of NSE Utilizing a State Vehicle” form (see attachment) prior to riding in or driving a state-owned vehicle or rental vehicle on behalf of the State, and maintained with the employee’s travel file documentation. The Acknowledgement form is also available on the Office of State Travel website noted above.
- E. Students shall not be authorized to drive state-owned or rented vehicles for use on official state business if not employed by the State. A student may be deemed as an “authorized traveler” on behalf of the State by the Undersecretary/designee to operate or travel in a state-owned or rented vehicle on official state business. The “Hold Harmless Agreement” form acknowledging the fact that the state assumes no liability for any loss, injury, or death resulting from said travel must be signed as part of the approval process, prior to riding or driving a state-owned or rented vehicle, and maintained with the student’s travel file documentation.
- F. Pursuant to YS Policy No. A.2.48, authorized drivers are responsible for the reporting requirements outlined therein.

VII. PROCEDURES:

- A. Out-of-state travel requests shall be submitted at least 30 days prior to the beginning of travel to provide sufficient time for the Undersecretary to authorize; except in the case of a valid emergency.
- B. All travel requests shall be completed on the official “Travel Authorization” form. If the purpose of the travel is to attend a conference, training, or workshop or similar event, a copy of the brochure describing the event and a detailed program agenda should be attached to the request.
- C. Once the “Travel Authorization” form has been approved by the Unit Head, a 156B to ensure appropriate budget allocation shall be submitted.
- D. Employees without travel cards traveling overnight in Louisiana shall utilize the Hotel Portal (refer to YS Policy No. A.3.16) for booking their hotel of choice. Any reservations made outside of the Hotel Planner portal requires approval through the Undersecretary.

Employees with travel cards may use the Hotel Portal or contact the hotel directly for reservations.

When searching the Hotel Planner portal, although the rate clearly meets PPM49 Guidelines for that particular area, each hotel selection will have subtext indicating that the presented rate may or may not meet the PPM49 guidelines.

1. The selection with an “ORANGE” box will allow the reservation request to be processed normally. When the request is completed by the traveler, the Program Administrator will receive notification to provide the payment information, and approve the request. The account will not be charged until the traveler arrives at the hotel.
2. The selection with a “WHITE” box will also allow the reservation request to be processed, however, when the Program Administrator receives the notification and enters the payment information, IT WILL REQUIRE PAYMENT IMMEDIATELY. This particular selection should only be done if the travel is absolutely certain travel will take place.

The attached “Tax Exemption Form” [R-1376 (01/09)], signed by the Undersecretary, must be submitted to the hotel to document employee eligibility for exemption from payment of state sales taxes on authorized travel expense charges that are directly reimbursable by the State of Louisiana.

It is the employee’s responsibility to ensure that all rates booked are within PPM 49 allowances and not rely on the portal’s banners.

- E. Employees traveling on official business shall provide themselves with sufficient funds for all routine travel expenses not covered by the Corporate Travel Card, LaCarte Purchasing Card, if applicable, and/or the agency’s CBA account. (Refer to YS Policy Nos. A.3.10 and A.3.16).

Advance of funds for travel shall be made only for extraordinary travel pursuant to the exemptions noted in the attached “Louisiana Travel Guide”.

VIII. TRAVEL REIMBURSEMENT

- A. All travel shall be reimbursed in accordance with the “Louisiana Travel Guide” (PPM 49).

No employee shall be reimbursed for lodging and/or meals furnished at a state facility or other state agency, or furnished by another party at no cost to the traveler.

In no case shall a traveler be allowed mileage or transportation when he/she is gratuitously transported by another person.

- B. Upon completion of travel, YS employees shall complete the attached "Travel Expense Account" form [BA-12 (03/97)], unless exception has been granted by the Commissioner of Administration. The employee completing the form and the immediate supervisor must sign the form prior to submission.
- C. Claims should be submitted within the month following the travel, but preferably held until a reimbursement of a least \$25.00 is due. Department Heads, at their discretion, may make the 30 day submittal mandatory on a department wide basis.

Travel shall be reimbursed in an expeditious manner. In no case shall reimbursements require more than thirty (30) days to process from receipt of complete, proper travel documentation.

- D. Central Office personnel shall route completed "Travel Expense Account" forms through messenger mail to:

Department of Public Safety
OMF- Attention: Katie Ryland
Interoffice Mailbox B-13

- E. Regional personnel and secure care facility personnel (if not reimbursed through secure facility Imprest Fund) shall mail completed "Travel Expense Account" forms to the following address for processing:

Department of Public Safety
OMF - Attention: Travel Section
P.O. Box 66909
Baton Rouge, LA 70896

IX. REQUIRED DOCUMENTATION:

The following documentation shall be maintained in accordance with the "State Travel Guide", for the timelines established in YS Policy No. A.1.9:

- A. All approved "Travel Authorization" forms, with attached receipts, agendas, etc. as listed in PPM 49.
- B. All employees/students deemed as authorized travelers by the Undersecretary/designee for official state business only.
- C. Acknowledgement forms for all non-official state employees.
- D. Acknowledgement forms for all student workers, if applicable.
- E. Special travel reimbursement approvals.
- F. Documented travel via state aircraft when common carrier services are unavailable and time is at a premium.
- G. Documentation that travel to a destination more than 500 miles is the most cost-effective means of travel in a state vehicle.

- H. Justified documentation for personal vehicle mileage reimbursement over 99 miles, for purposes to benefit the agency.
- I. Commissioner of Administration approvals for monthly vehicle allowances for personal vehicle use for state business.
- J. Undersecretary/designee approval for larger size vehicle rental for special medical requirements when supported by a doctor's recommendation.
- K. Approvals for single day travel meal reimbursement when it is determined to be in the best interest of the agency.
- L. Approvals for routine lodging overages not to exceed fifty percent.
- M. Approvals for routine lodging overages not to exceed seventy-five percent when the Governor has declared an emergency.

X. STAFF DEVELOPMENT:

Employees shall be trained at the time of hire. To ensure program compliance, an annual training shall also be conducted for all active cardholders and approvers by the Program Administrator.

Previous Regulation/Policy Number: A.3.2

Previous Effective Date: 05/05/2016

Attachments/References:

- Travel Authorization.01-2013.doc
- Acknowledgement of NSE Utilizing State Vehicles.pdf
- Travel Expense Account.03-97.doc
- 2016-2017 Travel Guide.pdf
- 2016-2017 Pocket Travel Guide.pdf