Travel

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Document Owner's Approval:	 Janelle Folse, Chief Financial Officer		
Executive Director's Approval:	 Kristin Bonner, MHA, BSN, RN, Executive Director		

Policy Statement:
South Central Louisiana Human Services Authority (SCLHSA), herein referred to as the Authority, will adhere to the policy and regulations promulgated by the Louisiana Division of Administration (DOA) regarding General Travel Regulations (Policy and Procedure Memorandum (PPM) 49).

Rationale:
To provide to SCLHSA staff, Board Members and contractors the specifics regarding who is allowed to travel, the authorization needed in order to travel, and the reimbursement allowances for travel incurred in accordance with PPM 49.

Procedure:
The DOA annually, and periodically, updates PPM 49 and issues a State Travel Guide that summarizes PPM 49. All travel authorizations and reimbursements through ~~the~~ SCLHSA are subject to the provision of the DOA PPM 49. SCLHSA expense is interpreted to include all funds, including gifts and grants, which are administered by the Authority. Reimbursement for the cost of any travel can be obtained only as provided in the auspices of the current Louisiana Travel Guide which can be found at https://www.doa.la.gov/doa/ost/ppm-49-travel-guide/

A. Process for Routine Travel:
   1. The Compliance Officer has the responsibility of verifying which employee and non-employee is eligible to drive. The Compliance Officer compiles a list of Approved Drivers and Non-Approved Drivers at the beginning of, and maintains throughout, the fiscal year for the Executive Director's review and approval.
   2. The Travel Coordinator will initiate an annual Travel Authorization (TA) form on behalf of a traveler when their first request for routine reimbursement is received. The Travel Coordinator will assign a TA# from the internal Travel Log then routes the TA to the employee for his/her signature and that of his/her supervisor or to the non-employee for his/her signature and that of the Executive Director. The TA is then returned to the Travel Coordinator who will maintain on file for future reimbursements on routine travel.
   3. Employees are expected to use a State Vehicle when available. If travel occurs in a personal vehicle, reimbursement for miles traveled will be made in accordance with PPM 49.
   4. Upon completion of a single trip travel or the end of the month,
      a) an employee who is requesting reimbursement of travel expenses will enter into LEO a Travel Expense Request for reimbursement. See attached instructions for entry.

b) a non-employee who is requesting reimbursement of travel expenses will submit a Travel Expense Account form. See attached instructions to complete.

A. Process for Conference ~~of~~ or Training Travel:
   1. A Travel Authorization (TA) Form shall be completed by any employee or non-employee requesting to attend a conference or training. The TA should be submitted as early as possible to the Travel Coordinator for the Executive Director's review and decision of approval/disapproval to attend. The TA for the conference or training shall include an agenda for the event, a completed registration form along with a total estimate of expenses to attend the event. The Travel Coordinator will assign a TA# from the internal Travel Log.
   2. The Travel Coordinator will notify the traveler and supervisor/contract monitor of the Executive Director's decision. The traveler is notified registration fees, if applicable, and hotel accommodations will be arranged by the Travel Coordinator and paid by SCLHSA's Travel Coordinator using the SCLHSA's Controlled Business Account (CBA) Card.
   3. In the event, a traveler is requesting to attend a conference or training and is offered a complimentary admission/registration, lodging and/or transportation, the Complimentary Admission, Lodging And/Or Transportation Disclosure Statement is to be completed by the Traveler and accompany the TA.
   4. Upon return,
      a) the employee will enter into LEO a Travel Expense Request for reimbursement of any expenses personally incurred. See attached instructions for entry.
      b) the non-employee will submit a Travel Expense Account form. See instructions to complete.

B. The Fiscal Office will log each reimbursement request onto the internal Travel Log.
   1. for employees, the Fiscal Office will generate at least quarterly a Travel Reimbursement Report from LEO to ensure all reimbursement submissions are processed. The Traveler Coordinator will be notified of any entry that does not have a Trip# or has reimbursement pending then the Travel Coordinator will follow up with employee or LDH Travel Section for a status.
   2. for non-employees, the Fiscal Office staff will review the internal Travel Log to ensure all reimbursement submissions are processed. The Fiscal Accountant will follow up with the non-employee or LDH Travel Section for a status.

Compliance Requirement:

- Louisiana Division of Administration (DOA) General Travel Regulations (Policy and Procedure Memorandum (PPM) 49)

Attachments:

- Travel Authorization (TA) Form
- Complimentary Admission, Lodging And/Or Transportation Disclosure Statement
- SCLHSA Instructions for Employees to Enter Travel into LEO
- Travel Expense Account Form
- SCLHSA Instructions for Non-Employees to Complete a Travel Expense (TE) Account form

Linkages:

- Louisiana Travel Guide https://www.doa.la.gov/doa/ost/ppm-49-travel-guide/
- U.S. General Services Administration (GSA) https://www.gsa.gov/travel/plan-book/transportation-airfare-pov-etc/privately-owned-vehicle-pov-mileage-reimbursement-rates
- U.S. General Services Administration (GSA) https://www.gsa.gov/travel/plan-book/per-diem-rates