



Statewide Travel Management System (STMS) – Preparing for Transition

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Statewide Travel Management System (STMS) - Topics

- Overview of the STMS
- Employees using the STMS – profiles and responsibilities
- Mission Critical travel statements needed
- DMS public records policy overview
- Training
- Transition date – late January 2020



Statewide Travel Management System (STMS) - Background

- The Legislature in 2016 appropriated funds for implementing a travel system to be used by executive branch agencies and the judiciary
- The Department of Management Services (DMS) was given the task of procuring and implementing the STMS
- It has taken a few years for the STMS to be developed and implemented across 30+ state agencies

Statewide Travel Management System (STMS) – Employees Only

- The STMS is for employee travel only
- Non-employee travel will continue to be processed with the current “paper” travel documents
- State agencies are required to use the STMS for employee travel per s. 112.061 (16), F.S.



EMPLOYEES ONLY

Statewide Travel Management System (STMS) - Background

- Most state agencies have transitioned to the STMS
- Justice Administration offices will transition to the STMS in late January 2020
- Training will be provided for all STMS users prior to transitioning to the STMS
- DMS website with STMS information:

https://www.dms.myflorida.com/agency_administration/statewide_travel_management_system



Statewide Travel Management System (STMS) - Background

- DMS is technically the “owner” of the STMS and will maintain the travel records for all agencies
- STMS will create a trip report which will replace the travel voucher
- STMS will also create the authorization to incur travel expenses form and travel advance forms where needed
- The trip report and other travel documents created by the STMS may be printed if needed
- Receipts such as hotel bills, gas receipts, car rental receipts and so on, related to each trip, will be uploaded to the STMS for each trip

Statewide Travel Management System (STMS) - Background

- Access to the STMS will be provided by JAC
- Access is secure and will require a user name and password to login
- STMS users in each office will be able to view travel documents at any time to monitor the progress of a trip and determine when the reimbursement is issued to the traveler (for their office only)
- No batch sheets will be sent to JAC for travel recorded in the STMS
- Once your office has completed the final approval for a trip and attached the receipts, JAC accounting office staff will have access to the trip for final review and upload to FLAIR



Activities in Preparation for Transition to STMS – User Lists

- Managers in each office have been working with JAC to determine which employees will be accessing the STMS and each employee's responsibilities (profiles) in the STMS
- The employee lists and responsibilities (profiles), will be redistributed to the managers again in the next few days– to make any necessary changes – due back to JAC by 1/3/20
- Send completed lists to: accounting@justiceadmin.org
- Employees will be uploaded from the lists into the STMS for each office including JAC users



Activities in Preparation for Transition to STMS – User Lists

- Once users are added to the STMS via the initial upload, emails will be generated to: travelers, preparers and approvers with instructions for logging into the STMS (proxy travelers will not receive emails)
- JAC has not begun that process, it will occur over the next few weeks
- After the initial upload, users will be added to the STMS by JAC staff

Activities in Preparation for Transition to STMS – Mission Critical Statements

- Required by Florida Law to travel only when “critical to the mission” of the agency
- The statement(s) explain the types of “mission critical” travel for each office
- In the STMS, the statement is selected from a drop-down menu when creating the trip
- Becomes part of the travel form – trip form



JAC's Mission Critical Travel Statement

The Justice Administrative Commission (JAC) provides administrative services for 49 judicial-related offices (JROs), pursuant to s. 43.16, F.S., and contracts with and pays private attorneys appointed to represent indigent persons. The following travel is mission critical: meeting with agency heads and staff served by JAC; court-ordered travel, travel reasonably necessary in JAC's responsibility for s. 29.007; agency attorneys participating hearings, trials, and appellate oral arguments; employee couriers transporting official documents; hosting or attending conferences and training events which enhance the services provided to the JROs; other travel necessary in the performance of the mission as determined by the Executive Director. (743 characters)



Mission Critical Statement – GAL Actual Statement in STMS

- TRIP DETAILS

* <u>POINT OF ORIGIN</u> ?	DeLand
* <u>DESTINATION</u> ?	DeLand
* <u>DEPARTURE DATE AND TIME</u> ?	8/6/2019 10:00 AM
* <u>RETURN DATE AND TIME</u> ?	8/28/2019 5:15 PM
* PRIMARY MODE OF TRANSPORTATION	Personal Vehicle
* <u>TYPE OF TRAVEL</u> ?	In State
* MISSION CRITICAL STATEMENT	1. Case Related: Authorized travelers may claim travel reimbursements for all travel that is necessary and appropriate to represent children assigned to the GAL program. Travel may include visits to meet with GAL volunteers or children at their homes, schools or other neutral locations. It may also include court appearances and meetings with other State agency, non-profit or third party officials to discuss a child's dependency case. A traveler may not claim travel reimbursement when travel relates to a child the traveler has volunteered to represent.



Activities in Preparation for Transition to STMS – Mission Critical Statements

- “Mission Critical” travel statements need to be provided to JAC for uploading into the STMS
 - One or multiple statements may be used; ***each statement has a character limit of 1200 characters only***
 - Please send the statement(s) in “Word” format, not .pdf format
 - Send statements to: accounting@justiceadmin.org
 - Statements are due to JAC by 1/3/20



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



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

STMS and Public Records

- ***DMS will release without notifying JAC*** documents or data 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 in the STMS. 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

SECURED RECORD ?



STMS and Public Records – People First Indicators

- Per s. 119.071, F.S., only certain employees may be marked with privacy indicators in People First
- All state employees have four privacy indicators available to them in the People First system: 1) sworn/certified; 2) restricted employee; 3) restricted relative; and 4) protected identity
- Florida statutes limits the disclosure of specific data fields, depending on the specific statutory exemption the employee falls under
 - In the case of the STMS, this primarily means the person's name
 - Other restricted data like addresses, SSNs, phone numbers, etc., are not contained in the STMS



STMS and Public Records

- DMS will contact JAC if they receive a public record request for STMS records
 - marked “secure” or
 - a person with a “restricted relative” indicator in People First or “protected identity” in People First
- JAC will then contact the office in question following our current public records policy



STMS and Public Records

- JAC will not determine whether a record should or should not be released; each office will make that determination for its STMS travel information. JAC will not be in a position to “defend” any decision of an individual Office of Justice Administration related to public records
- If an Office of Justice Administration determines the secure record or portions of the secure record should not be released, that office will be expected to “defend” that decision in any subsequent litigation and bear the litigation costs



Public Records Policy - Suggestions

- It is encouraged that each office add to their current public records policy or create a public records policy to document which trips will be marked secure in the STMS and the statutory authority for marking a trip secure (Florida Statutes or case law or both)
- If questioned about marking trips secure, the policy will provide the authority and reasoning for the action
- Only users assigned the **Approver Profiles** in the STMS may mark trips secure; JAC is unable to mark trips secure



STMS and Public Records

- JAC will provide training regarding public records with all STMS training events
 - Marking trips “secure” in the STMS
 - Restricted relative or privacy indicators in People First
 - What to expect from DMS

STMS and Public Records – Travel Data “Portal”

- DMS has provided a travel “portal” on their website which allows anyone to run reports of STMS data
- The “portal” is required by the Laws of Florida



Department of
**MANAGEMENT
SERVICES**

<https://travel.myflorida.com/>

[DMS CUSTOMER SATISFACTION SURVEY](#) | [SITE MAP](#) | [CONTACT DMS](#) | [MYFLORIDAHOME](#)





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Search State Travel

Welcome to the State of Florida Travel Public Portal. The State is transitioning to an enterprise Statewide Travel Management System (STMS). This site provides access to view employee travel processed by STMS.

Upon the completion of the project, this site will include travel information from all executive branch state agencies and the judicial branch.

The data in the portal is updated weekly.

State of Florida Travel

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STMS and Public Records – Travel Data “Portal”

- Sample display of travel data from the “portal”
- Should read: Justice Administration for our offices

Show entries. Showing 1 to 10 of 37,637 entries.

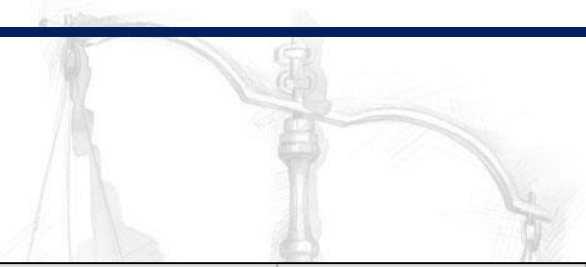
Entity	Start Date	End Date	Total Cost	Travel Type	Destination	Transport Mode	Traveler Name	Tit
DEPARTMENT OF JUVENILE JUSTICE	10/02/2019	11/28/2019	\$52.04	IN STATE	TAMPA VICINITY	PERSONAL VEHICLE	TONYA KING	JU
DEPARTMENT OF STATE	11/26/2019	11/26/2019	\$0.00	IN STATE	BONIFAY	RENTAL CAR	CHARLES HAMPTON OF	
DEPARTMENT OF ENVIRONMENTAL PROTECTION	11/26/2019	11/26/2019	\$0.00	IN STATE	STARKE, FL	STATE CAR	JESSICA DUKE	EN
DEPARTMENT OF REVENUE	11/25/2019	11/25/2019	\$6.22	OUT OF STATE	NUTLEY, NJ	PERSONAL VEHICLE	YIWEN GU	SEI
DEPARTMENT OF REVENUE	11/25/2019	11/25/2019	\$60.19	IN STATE	LEESBURG	RENTAL CAR	ARTHUR LATNO	GC
DEPARTMENT OF REVENUE	11/04/2019	11/25/2019	\$59.63	IN STATE	MACCLENNY	PERSONAL VEHICLE	TERESA NORRIS	RE
DEPARTMENT OF STATE	11/25/2019	11/25/2019	\$0.00	IN STATE	CRESTVIEW	RENTAL CAR	CHARLES HAMPTON OF	
DEPARTMENT OF REVENUE	11/25/2019	11/25/2019	\$40.93	IN STATE	OVIEDO	PERSONAL VEHICLE	RICHARD GIACOBE	SEI
DEPARTMENT OF HIGHWAY SAFETY AND MOTOR VEHICLES	11/18/2019	11/23/2019	\$820.50	IN STATE	MIAMI, FL	STATE CAR	VICTOR CULLARS	PL
DEPARTMENT OF HIGHWAY SAFETY AND MOTOR VEHICLES	11/22/2019	11/23/2019	\$166.00	IN STATE	TAMPA	STATE CAR	MAGNUS HINES	CH

STMS and Public Records – Travel Reports “Portal”

- Trips marked “secure” will not appear in the data from the portal
- Employees’ names will be shown as “exempt” if restricted relative or protected identity is indicated in People First
- Legislative staff and Governor’s office staff have access to the STMS data, to run reports
- An executive summary of public records and the STMS may be found on JAC’s website under Accounting Services



Training



Statewide Travel Management System (STMS) Training Events

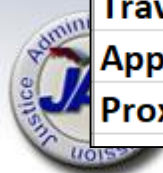
Type of Training	Date	Time	Attendees
GoToMeeting	Wednesday, December 18, 2019	10:00-11:30 AM	Preparers Travelers Approvers
GoToMeeting	Thursday, January 9, 2020	10:00-11:30 AM	Preparers Travelers Approvers
JAC Offices - Classroom Instruction (No GoToMeeting)	Monday, January 13, 2020	9:00 AM - 3:00 PM	Preparers Travelers Approvers
GoToMeeting	Wednesday, January 15, 2020	2:00 -3:30 PM	Preparers Travelers Approvers

Preparers- prepare travel for others

Travelers-prepare travel for themselves

Approvers-supervisors and others who approve travel

Proxy travelers - someone prepares travel for them, they will not access the STMS (no need to attend)



Training

- The same login information will be used for all GoToMeeting sessions:

GoToMeeting Login Information for the dates: 12/18, 01/09, 01/15 - Below:

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/211658733>

You can also dial in using your phone.

Access Code: 211-658-733

JAC Website – STMS Information

- JAC will be providing information related to the STMS on the JAC website

<https://www.justiceadmin.org/home.aspx>

- Click Services, then Accounting



The screenshot displays the website header with the JAC logo and the text "JUSTICE ADMINISTRATIVE COMMISSION" next to an American flag. The navigation menu includes "Home", "Services", "Court Appointed/IFC", "Due Process (CAC/IFC)", "Contacts", "Search", and a "MY JAC LOGIN" button. The breadcrumb trail shows "JAC Home / Accounting". The main content area is titled "Accounting Services".



JAC Website – STMS Information



- Look for the STMS heading

[JAC Home](#) / [Accounting](#)

Accounting Services

Welcome

JAC's **Accounting Section** processes disbursement and revenue transactions for the agencies we serve in the areas of: operations, due process, civil commitment, ordinary witness funding requests, and juror cost distributions. The Accounting Section serves as a liaison between the agencies we serve and the Departments of Financial Services and Revenue. We review disbursements and revenue transaction for accuracy and compliance with applicable statutes and state rules. JAC's Accounting Section is comprised of two units, Disbursements and Revenue.

The **Disbursements Unit** reviews disbursement transactions for adherence with ss. [29.005](#), [29.006](#), [40.29](#), [43.16](#), [112.061](#), [215.422](#), [394.910](#), [215.97 F.S.](#) and others; as well as adherence to the Department of Financial Services (DFS) Policies and Procedures Memoranda, and *The Reference Guide for State Expenditures*.

The **Revenue Unit** is responsible for the classification and coding of receipts, and processing revenue transactions for the agencies we administratively serve in accordance with s. [116.01](#), F.S. and others.

Below are relevant, memos, documents, guides, and forms relating to JAC Accounting.

Statewide Travel Management System (STMS) - Documents and Information New 12/5/2019

- [Executive Summary - STMS Public Records Policy](#)



JAC Contact Information –STMS Issues and General Accounting

- Vicki Nichols, Director of Accounting
vicki.nichols@justiceadmin.org
- Dina Kamen, Deputy Director of Accounting
dina.kamen@justiceadmin.org
- Group email to both Dina and Vicki
accounting@justiceadmin.org
- Or call: 850-488-2415

