

**Jacksonville City Council
2019 Orientation**

**ADMINISTRATIVE SERVICES
DIVISION**

**EMPLOYMENT
&
OFFICE PROCEDURES**

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ADMINISTRATIVE SERVICES DIVISION

I. ORGANIZATIONAL STRUCTURE

A. Services Provided

The Administrative Services Division is responsible for performing the administrative functions for the Office of City Council. These functions include the preparation and maintenance of the budget, purchasing office supplies and equipment, coordinating and payment for services, human resources, payroll, travel, employee benefits, computer and telephone related services and equipment, scheduling and maintenance of City Council meeting rooms, and the front desk reception area. Additional duties include distribution of incoming mail, preparing coffee and water for meetings, maintaining inventory of all City-owned equipment/supplies, and many other office-related functions.

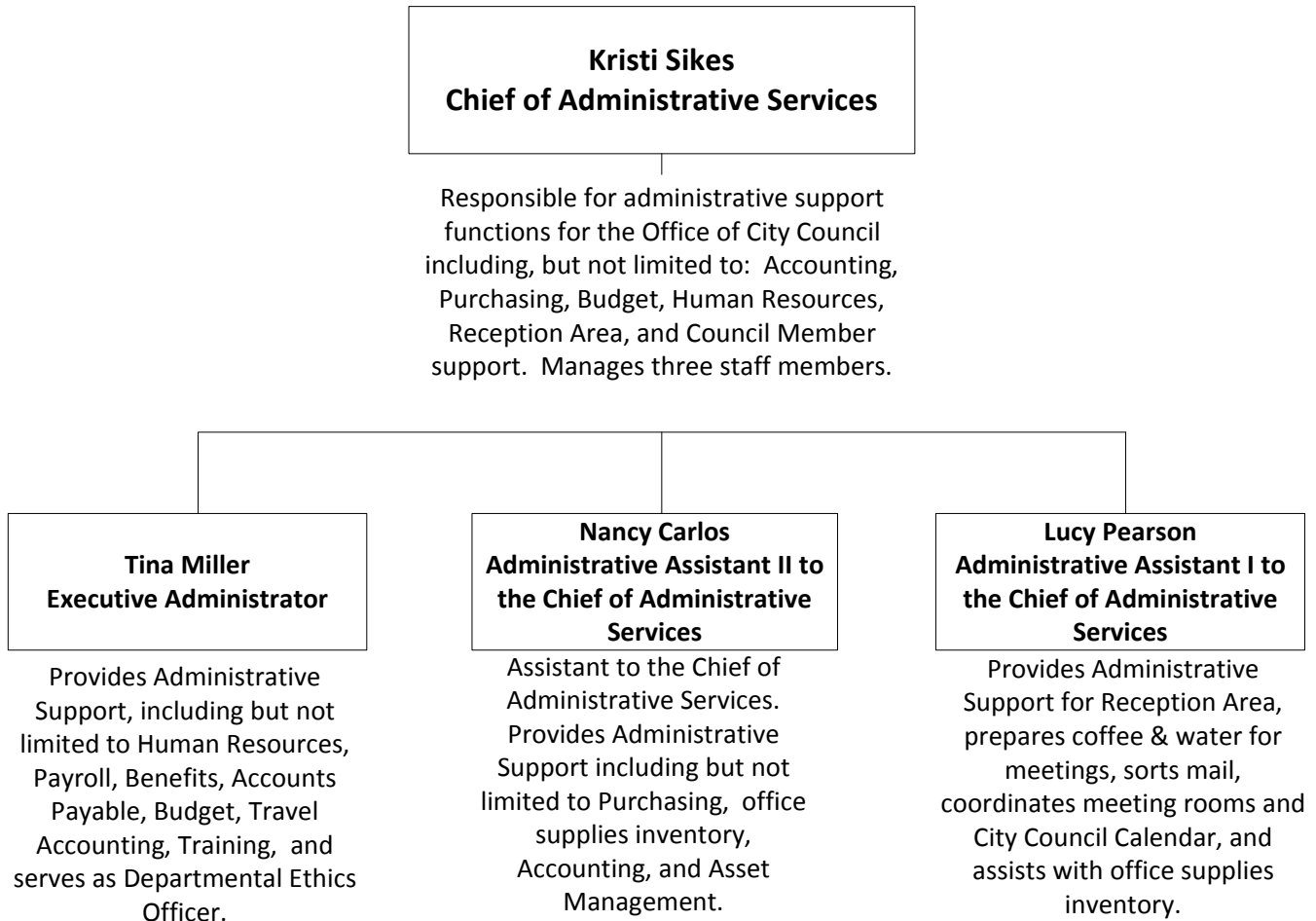
The Administrative Services Division is managed by the Chief of Administrative Services. Currently, Kristi Sikes serves as the Chief of Administrative Services and has done so since 1992. Ms. Sikes supervises three employees:

- Tina Miller, Executive Administrator
- Nancy Carlos, Administrative Assistant II
- Lucy Pearson, Administrative Assistant I

Although the Office of City Council employs many individuals with varied work schedules, the City Council reception area is staffed from 8:00 AM to 5:00 PM, Monday through Friday (with the exception of City-observed holidays). The front doors to the City Council suite are locked when the receptionist leaves at the end of the work day.

B. Organizational Chart

Office of City Council Administrative Services Division



7/18/2020

II. TIME & ATTENDANCE REPORTING

(Rev. March 1, 2019)

A. Work Schedule Requirements

In Order to ensure compliance with local, state, and federal laws, the following policy outlines the requirements for maintaining employment and benefits for the Office of City Council.

Executive Council Assistants (ECA)

Employees in these positions are required to work* a minimum of 80.00 hours during each bi-weekly pay period. Dates and scheduled hours of work are determined by the appointing Council Member for their Executive Council Assistant (ECA). A pay schedule, including the dates (from start to end) for each bi-weekly pay period, is distributed to employees upon employment, and then prior to the beginning of each fiscal year.

In addition, these employees are entitled to personal leave hours which are granted at the end of each pay period. Newly hired employees begin earning 6.15 hours of personal leave (based on 80.00 hours of pay) per pay period which accumulates to 20 days per year. Additionally, employees are entitled to one "Personal Leave Day" per fiscal year, meaning an additional 8-hour day off with their supervisor's advance approval. This day cannot be used in increments. City observed holidays are included as an 8-hour "paid" day off from work.

If an employee does not work 80.00 hours by the last day of the pay period, it is mandatory for the employee to charge personal leave for the number of hours needed to reach a total of 80.00.

Since these particular employees are appointed by elected officials, they are exempt from the *Fair Labor Standards Act (FLSA)* and are not entitled to overtime compensation. However, the approval of Compensatory Time on an hour for hour basis for hours worked in excess of the 80-hour minimum during the bi-weekly pay period in accordance with Sections 3.2 and 3.4 of the *Appointed Officials and Employees Salary and Employment Plan** may be approved by the Council Member. (*This document formalizes a uniform employment plan for appointed officials and employees throughout City government, which includes benefits as well as restrictions, and should be reviewed prior to employment.) However, if an employee is required to work on a holiday, they will automatically receive the 8.00 hours of Holiday Pay, and may request to be compensated in the form of Compensatory Time for the hours worked.

* *City-observed holidays are counted as "work" hours when determining the 80-hour minimum for City Council employees.*

B. Reporting Requirements

Every employee (excluding Elected Officials) is required to enter and submit their time and attendance records to the City's electronic Time and Attendance System (TAS) no later than the last day of each pay period, unless otherwise scheduled to accommodate holidays. (See *Time & Attendance Reporting* instructions.) All Leave Requests, Overtime Requests, and Timesheets must be approved in TAS by the employee's supervisor by 5:00 PM by the last day of the pay period. Each Council Member approves time and attendance in TAS for their Executive Council Assistant. Actual work hours (times of day) are not recorded in TAS, only the total hours worked for each day are entered. It is the employee's responsibility to maintain a record of their actual arrival and departure time each work day, as well as time periods where work is performed away from the Council Office. The employee will be required to produce this record upon request.

If a Council Member is unavailable to approve time and attendance for their Executive Council Assistant by the deadline, the Council Member may contact the Executive Administrator via email to request that the approval be performed for any pending time and attendance data for their ECA for the current pay period. However, Council Members are encouraged to make every effort to approve time and attendance for their ECA prior to established deadlines.

EXHIBIT 1 – Time & Attendance Reporting

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TIME & ATTENDANCE REPORTING

The City of Jacksonville uses a Time and Attendance System known as **TAS** to record employees' work and leave hours. Using **Internet Explorer**, employees submit Leave Requests, Overtime Requests, and Timesheets electronically. Supervisors are notified via a system-generated email of pending requests from subordinates. Once supervisors approve, deny, or reject these requests, employees are notified of the status via a system-generated email. Employees are required to submit their completed Timesheets by the established payroll deadlines. The TAS system is disabled on Monday of pay weeks at 10:00 AM, meaning access to TAS is suspended. However, earlier deadlines are sometimes imposed to accommodate holidays. **The deadline to submit and approve requests and timesheets for the Office of City Council is Friday on non-pay weeks by 5:00 PM.** This deadline allows time for review and/or to resolve any issues by the Executive Administrator before TAS is disabled by Central Payroll.

NOTE: Always use Internet Explorer when using TAS. Google Chrome is not always compatible with TAS applications and can cause errors.

WORK HOURS & OVERTIME

Appointed Officials and Employees of the Office of City Council are covered by the City's *Appointed Officials & Employees Salary & Employment Plan*. This plan is an instrument used to outline certain policies and benefits for Appointed Officials and Appointed Employees of the City. All sections of this plan apply to the employees of the Office of City Council, except where otherwise noted in these procedures.

NON-EXEMPT EMPLOYEES - Covered by the Fair Labor Standards Act (FLSA)

Classifications: Administrative Assistant to the Director/Council Secretary, Administrative Assistant I & II to the Chief of Administrative Services, Legislative Assistant I & II, and Research Assistant

Non-Exempt employees are covered by the FLSA. These employees are required to work (and/or charge personal leave for) a minimum of forty (40.00) hours each week (Saturday through Friday). For the Office of City Council, City-observed holidays are considered hours worked.

These employees, if authorized by their supervisor to work overtime hours, may be compensated in the form of cash payment or compensatory time (at a rate of 1.50 per 1.00 hour worked) for hours worked in excess of forty (40.00) within a work week. In accordance with the *Appointed Officials & Employees Salary & Employment Plan*, hours "worked" for the purposes of overtime calculation exclude leave of any type. However, City-observed holidays are considered as hours worked for the purposes of overtime calculation.

Employees cannot earn overtime and use leave within the same work week. Any overtime hours worked during a week that the employee has also used leave will be deducted from the employee's approved leave hours until the 40-hour work requirement has been met.

Employees may flex their work hours within the same work week, providing they have prior approval from their supervisor. (Please see ***Flexing Work Schedules*** section below.)

EXHIBIT 1 – Time Attendance & Reporting (Page 2 of 14)

EXEMPT EMPLOYEES - Not Covered by the Fair Labor Standards Act (FLSA)

Classifications: Director/Council Secretary, Chief of Administrative Services, Chief of Legislative Services, Chief of Research, VAB Operations Manager, Executive Administrator, Information Systems Administrator, Secretary to the Council President, and Executive Council Assistant

Exempt employees are not covered by the FLSA. These employees are required to work (and/or charge personal leave for) a minimum of eighty (80.00) hours per pay period. For the Office of City Council, City-observed holidays are considered hours worked.

These employees, if authorized by their supervisor to work additional hours, may be compensated in the form of straight time compensatory time (at a rate of 1.00 hour per 1.00 hour worked) for hours worked in excess of eighty (80.00) within a two-week pay period. In accordance with the *Appointed Officials & Employees Salary & Employment Plan*, hours “worked” for the purposes of compensatory time calculation exclude leave of any type. However, City-observed holidays are considered as hours worked for the purposes of compensatory time calculation. Employees should only be authorized to work additional hours if it is required to complete tasks within a limited period of time. Exempt employees may not receive cash payment for excess hours worked.

Employees may flex their work hours within the two-week pay period, providing they have prior approval from their supervisor and meet the 80-hour requirement. (Please see ***Flexing Work Schedules*** section below.)

LEAVE & OVERTIME REQUESTS

Requests for Leave and Overtime must be submitted prior to submitting the Timesheet for the correlating week. Work hours can be entered to Timesheets each day, but the Timesheet must be “SAVED” and not “SUBMITTED” until the end of the work week (Non-Exempt employees) or the end of the pay period (Exempt employees). Do not “SUBMIT” a timesheet until all applicable Leave and Overtime Requests have been submitted (which automatically populates the Leave and Overtime hours to the Timesheet).

ENTERING & SUBMITTING DATA IN TAS

1. Using Internet Explorer, enter the web address <http://inside.coj.net> (within City Hall), or log in to <http://remote.coj.net> (outside of City Hall) to open the TAS System via the *Employee Portal* application.
2. Once the *Employee Portal* opens, under the **My Info** tab select the **Time and Attendance System** link located in the green banner on the right side of the page.
3. To submit Leave and/or Overtime Requests, under **Submit Requests** at the top left of the page select **Submit a Leave Request** or **Submit an Overtime/Comp Credit Request**.
4. Enter your data to each field and select **Submit** to submit your request. (Detailed instructions below.)

EXHIBIT 1 – Time Attendance & Reporting

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NOTE: For employees who are approved to flex their time within their established flex period, it is beneficial to wait until the end of the work week (Non-Exempt Employees - 40-hour flex) or the end of the pay period (Exempt Employees - 80-hour flex) to determine if a Leave Request or Overtime Request is needed.

Leave Requests

1. To submit a Leave Request, under **Submit Requests** select [Submit a Leave Request](#) (top left).
2. Using your mouse, select the date of your leave from the calendar (click the calendar icon next to the *Leave Date* field).
3. Enter the leave hours for that date in the *Hours* field. All hours are entered with two decimal places in TAS. Personal Leave (i.e. AL, AS) hours may be used in 15-minute increments, **after** the 30-minute minimum has been met. Compensatory Leave (CTL) hours may be used in 15-minute increments. (Please see **Formatting Dates, Hours, & Times** section below.)
4. Using your mouse, select the drop down arrow for the *Leave Type* field to choose the type of leave you are requesting.
5. Enter the time of day for the *Leave Start Time* and *Leave End Time* field. Make sure that AM and PM are shown correctly. All times are entered to TAS in standard format. Military time format is not accepted. If you are requesting a standard 8-hour day off, the Start and End times do not have to be entered.
6. You may combine several dates of leave on one Leave Request, providing the leave dates occur within the same work week.
7. Once a Leave Request has been approved, those leave hours are “reserved” and deducted immediately from your “Available Balance” in TAS (shown on the *Leave Request*). The leave hours are not deducted from your “HR Leave Balance as of ___” (shown on the *Leave Request*) or your Oracle Leave Balance (shown on each Pay Statement) until the pay period during which the leave hours are actually used. Please note that once leave hours are reserved for a future date and deducted from your “Available Balance” in TAS, they are no longer available.
8. Leave Requests that remain pending and are not approved by the Supervisor in TAS will expire after ninety (90) days of the request date and are automatically removed from TAS.
9. Requests for **Bereavement Leave, Civil Duty, or Jury Duty:**

EXHIBIT 1 – Time Attendance & Reporting

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- a. To request **Bereavement Leave (BL)**, you must enter the relationship of the decedent to you (i.e. Mother, Spouse's Aunt, First Cousin) in the **Comments** section of the request. Please refer to the *Appointed Officials & Employees Salary & Employment Plan* for a complete list of relatives covered. You are also required to attach an obituary, funeral program, or signed letter from the funeral home that includes the full name and date of death of the decedent. The approved duration for Bereavement Leave is determined by your supervisor (and in accordance with the *Appointed Officials & Employees Salary & Employment Plan*), who will consider the decedent's relationship to you, required travel time, and other obligations that may be required of you on behalf of the decedent.
 - b. To request **Civil Duty (CD – subpoenaed as a witness) or Jury Duty (JD – summoned to serve as a juror)**, a copy of the subpoena/summons must be attached to the request.
 - c. To attach a scanned document to your Leave Request, select **Add Attachment** (located at the bottom of the Leave Request form next to the **Submit** button). In the *Title* field, enter a title for your document. In the *Attach Document* field, enter the name of your scanned document or select the **Browse** button to search for the document. If you select **Browse**, a new window will appear so you can view and select the file. Using your mouse, choose the scanned document you want to attach and select **Open**. Then select **Save** and the document will attach to your Leave Request.
10. Once you have reviewed and confirmed that the data entered is correct and that any required documentation is attached, you may submit your Leave Request by selecting the **Submit** button.

Overtime Requests

1. To submit an Overtime Request, under **Submit Requests** select **Submit an Overtime/Comp Credit Request** (top left).
2. Using your mouse, select the drop down arrow for the *Overtime Types* field to select **Comp Credit** or **Cash Payment**. (The TAS default is Comp Credit so if you are eligible (Non-Exempt employees) and want to request Cash Payment, you must change this field to **Cash Payment**.)
3. Using your mouse, select the date you worked overtime from the calendar (click the calendar icon next to the *Date of Overtime* field).
4. Enter the overtime hours for this date in the *Number of Hours* field. All hours are entered with two decimal places in TAS. (Please see **Formatting Dates, Hours, & Times** section below).
5. Select the *Explain Nature of Work or Emergency* field and type a brief statement of the assignment(s) you performed on overtime. Although "brief," you must include specific information such as "City Council Meeting" instead of "City Council" or just "Meeting," or "Filing legislative records" instead of "Filing."
6. Enter the time of day for the *Overtime Start Time* and *Overtime End Time* field. Make sure that AM and PM are shown correctly. All times are entered to TAS in standard format. (Military time format is not accepted.)
7. You may combine several dates of overtime on one Overtime Request, providing the overtime dates occur within the same work week. Overtime hours worked are earned in 15-minute increments.

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NOTE: If the overtime hours worked begin on one day and continue to the next day, without interruption, two separate entries must be entered to the Overtime Request. For example:

An employee who worked 8 hours of overtime that began on 5/3 at 5:00 PM and ended on 5/4 at 1:00 AM would add one entry to the Overtime Request as 7 hours on 5/3 from 5:00 PM – 11:59 PM and one entry for 1 hour on 5/4 from 12:00 AM – 1:00 AM.

8. Overtime Requests that remain pending and are not approved by the Supervisor in TAS will expire after ninety (90) days of the request date and are automatically removed from TAS.
9. Once you have reviewed and confirmed that the data entered is correct, you may submit your Overtime Request by selecting the **Submit** button.

FORMATTING DATES, HOURS, & TIMES

When entering dates, hours, and times in TAS, please remember the following:

- a. Always select the correct **Work Week** on your Timesheet – follow the payroll schedule
- b. All **Hours** are entered with two decimal places (8.00)
- c. **Times** are entered in standard format - EXAMPLE: 8:00 AM or 5:00 PM (No military format)
- d. **Work Hours** are entered in 15-minute increments (.25, .50, .75)
- e. **Annual Leave** and **Annual Sick** hours used are restricted to a 30-minute minimum, followed by 15-minute increments once the minimum has been met
- f. **Compensatory Leave** hours earned and used are restricted to 15-minute increments (.25, .50, .75)
- g. **Personal Leave Day** is an 8.00-hour day off and cannot be used in increments
- h. **Bereavement Leave, Civil Duty, Jury Duty, and other types of leave** used are restricted to a 30-minute minimum, followed by 15-minute increments once the minimum has been met
- i. **Overtime Hours** (whether cash payment or comp credit) are earned and recorded in 15-minute increments (.25, .50, .75)

15 minutes = .25 hour
30 minutes = .50 hour
45 minutes = .75 hour

FLEXING WORK SCHEDULES

If you are authorized to **flex your work hours**, you will only submit Leave Requests or Overtime Requests if your total work hours fall short or exceed the designated flex period for your classification. Therefore, you may wish to wait until the end of your designated flex period to submit Leave and Overtime Requests to prevent the need to recall, or have your supervisor reject, requests that are no longer needed. It is the employee's responsibility to maintain a record of their actual start and end times each work day. This record of actual time periods worked is required to support a flexed work schedule. Employees must be able to produce it upon request.

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Employees who wish to flex their work hours must have prior approval from their supervisor to do so. Fluctuating work hours that deviate from an employee's regular work schedule should be the exception, not the norm. The intent of flexing work schedules is to reduce overtime hours and/or to ensure work assignments are completed, not to reduce the amount of personal leave charged. It is important that all employees adhere to their normal work schedule unless they receive permission to do otherwise. Supervisors will consider office coverage and work assignments prior to approving an employee's request to flex work hours.

Designated Flex Period

Classification

40.00 hours per week

NON-EXEMPT EMPLOYEES: Administrative Assistant to the Director/Council Secretary, Administrative Assistant I & II to the Chief of Administrative Services, Legislative Assistant I & II, and Research Assistant

80.00 hours per pay period

EXEMPT EMPLOYEES: Director/Council Secretary, Chief of Administrative Services, Chief of Legislative Services, Chief of Research, VAB Operations Manager, Executive Administrator, Information Systems Administrator, Secretary to the Council President, and Executive Council Assistant

Non-Exempt Employees

Non-exempt employees who are approved to flex their work hours must enter their actual hours worked each day to their timesheet to equal forty (40.00) hours for the work week.

EXAMPLE: Work Week 8.00 10.00 6.00 8.00 8.00 = 40.00

Employees must be directed by or obtain prior approval from their supervisor prior to working any overtime. If an employee's work hours exceed forty (40.00) in a work week, the employee may request overtime compensation in the form of cash payment or compensatory time for the excess hours (via an Overtime Request in TAS).

If an employee's work hours (including holidays) total less than forty (40.00) hours in a work week, the employee is required to charge personal leave for hours not worked.

Exempt Employees

Exempt employees who are approved to flex work hours must enter their actual hours worked each day to their timesheet to equal eighty (80.00) hours for the pay period. The sum of their regular Work Hours for Week 1 and Week 2 must equal a minimum of eighty (80.00) hours. (This minimum must also be met prior to requesting any compensatory time for excess hours worked.)

EXAMPLE: Week (1) Work Hours 8.00 10.00 6.00 9.00 8.00 = 41.00
 Week (2) Work Hours 9.00 11.00 6.00 8.00 5.00 = 39.00
 80.00

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If an employee's work hours exceed eighty (80.00) in a pay period, the employee may enter a request for compensatory time for the excess hours (via an Overtime Request in TAS), if the supervisor approves the additional compensation. (Overtime should only be recorded on dates that the employee worked more than eight (8.00) hours.)

Additional compensation is not required for excess hours for Exempt employees. However, employees are expected to enter all hours worked to their timesheet, regardless of whether they are approved for additional compensation. If the additional hours will not be compensated, no Overtime Request should be submitted, but the hours should be included as **regular Work Hours** in TAS (which does not provide the employee with additional compensation). The employee's actual work hours are recorded for information purposes only. The example (below) shows the work hours for an Exempt employee who is not compensated for working additional hours; the employee will be compensated for eighty (80.00) hours only.

EXAMPLE:	Week (1) Work Hours	8.00	10.00	8.00	9:00	9:00	=	44.00
	Week (2) Work Hours	9.00	11.00	9.00	8.00	8.00	=	<u>45.00</u>
								89.00

If an employee's work hours (including holidays) total less than eighty (80.00) hours in a pay period, the employee is required to charge personal leave for hours not worked.

HOLIDAYS

Holiday pay for City-observed holidays in the amount of eight (8.00) hours will be automatically populated to your Timesheet (entered by Employee Services). Do not enter any data for the Holiday pay element.

TIMESHEETS

1. Once you have submitted your Leave and Overtime Requests, under **Submit Requests** at the top left corner of the page you will select **Submit a Timesheet**. If any Leave Requests and/or Overtime Requests are pending, the hours for those requests will appear on your Timesheet in **blue** font. This is an indication that your request has not been approved in TAS by your supervisor.

NOTE: Notify your supervisor of requests pending for more than 24 hours. Make sure all requests are approved prior to the deadline for approving Timesheets. Although TAS will allow your Timesheets to be submitted to your supervisor with *pending* Leave and Overtime requests, TAS will not allow your supervisor to approve your Timesheets until all pending Leave and/or Overtime Requests for the pay period have been approved first. All Leave Requests and Overtime Requests that coincide with the current pay period must be approved prior to the approval of your Timesheets.

After your requests are approved by your supervisor in TAS, leave and overtime hours on your Timesheet will change to **black** font.

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2. In the top left corner of the weekly Timesheet, select the dates for Week 1 of the current pay period. Enter your work hours. This process is repeated to enter work hours for Week 2.

If you submitted leave for a partial day, the actual Work Hours for that day must also be entered to TAS (combined total not to exceed eight (8.00) hours in a day). The exception would be if you are flexing your work hours from another day within your flex period to cover the difference. (NOTE: If approved to flex work hours, all hours must be entered for the actual day they were worked.) Always check the total number of hours at the bottom right corner of your Timesheet before you submit it. Your Timesheet should never reflect more hours than you worked or charged leave for.

NOTE: If you use leave time for an entire work week and you have 0.00 Work Hours to enter to your Timesheet for that week, TAS requires that you select the drop down arrow next to Work Hours in the Activity field and change it from “Work Hours” to “None.” The TAS system will produce an error, preventing you from submitting your Timesheet until you make this change. (Please see *TAS ERRORS – When Submitting Requests & Timesheets* section below.)

3. You may enter your work hours to your Timesheet at anytime during the pay period. It is important to **Save** your Timesheet until you are ready to actually **Submit** it for payroll. **Payroll submission deadlines for the Office of City Council are Fridays before pay weeks by 5:00 PM.** This deadline may be adjusted to an earlier date and time to accommodate holidays. Although you can submit Timesheets early in TAS, it is not recommended unless you will be on leave the remainder of the pay period. Because schedules may change late in the pay period, it is wise to wait to Submit your Timesheets (**Non-Exempt employees** submit each Friday by 5:00 PM, **Exempt employees** submit both weeks by Friday before payweeks by 5:00 PM) to prevent errors that may result from early reporting.
4. Your supervisor will be notified via email (automatically generated from TAS) each time you submit a request. As each Leave Request, Overtime Request, and Timesheet is either approved or denied, you will receive an email notification of the status. If your Leave Request or Overtime Request is denied, the reason for the denial will appear in the **Comments** section of the request. You cannot edit a request that was denied, you must enter and submit a new request if applicable.

Once your requests are approved, any leave and overtime hours that were automatically populated to your Timesheet will change from **blue** font to **black** font. (Unlike Leave and Overtime Requests, you can make corrections to a Timesheet that was denied, and resubmit it once the corrections have been made.)

NOTE: Always review your Timesheet at the end of each work week to ensure that the amount of hours shown for each pay element (Work Hours, Leave, Overtime), as well as your Total Hours, are correct.

5. **Non-Exempt** employees are required to work a minimum of forty (40.00) hours by the end of each work week. Personal leave must be charged for any hours not worked. These employees are required to submit their Timesheet weekly (Fridays). With prior approval from their supervisor, these employees are allowed to flex their work hours within the 40-hour work week.

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Exempt employees are required to work a minimum of eighty (80.00) hours by the end of the last day of each pay period (Friday of Week 2). Personal leave time must be charged for any hours not worked. It is recommended that Timesheets for both Week 1 and Week 2 are “Saved” and not actually “Submitted” until Friday afternoon of Week 2 (Friday before pay week). This will provide employees the opportunity to flex work hours or to submit Leave Requests for the two-week period. With prior approval from their supervisor, these employees are allowed to flex their work hours within the 80-hour pay period.

6. **All access to the TAS System is suspended on Monday of pay weeks at 10:00 AM by Central Payroll. (Observed holidays may require an earlier deadline which is noted on the Payroll Schedule). The Office of City Council’s deadline for submitting and approving all Leave Requests, Overtime Requests, and Timesheets in TAS is Friday afternoon before pay week.** This provides an opportunity for review by the Executive Administrator (and correction if needed) prior to the disabling of the TAS system citywide to run payroll.

CORRECTIONS TO SUBMITTED/APPROVED DATA

1. If an employee discovers an error after they have submitted a Leave Request, Overtime Request, or Timesheet, the employee can recall the transaction if it has not been approved by their supervisor. If the transaction has been approved, only the supervisor can void it by rejecting it in TAS but the rejection (and resubmission) must take place prior to the 10:00 AM shutdown on Monday of pay weeks.
2. To recall a transaction, go to the TAS home page and under **Manage Requests** select **Manage Requests and Timesheets**. Using your mouse, select the transaction for recall and then select **Recall**. You will receive an email notification that the transaction has been successfully recalled.

NOTE: Once a Leave or Overtime Request has been recalled by the employee or rejected by the Supervisor, it **cannot** be modified. The employee must submit a new request.

The TAS system will allow rejected *Leave* and *Overtime* Requests to be modified, submitted, and approved, but the data does not transfer to the payroll system; hence, the employee must manually close the rejected Leave or Overtime Request and submit a new one.

3. If the supervisor has already approved the transaction, the supervisor must go to the TAS home page and under **Manage Requests**, select **Reject Approved Requests and Timesheets** in order to reject it. (Please see **Reviewing & Approving Data or Denying/Rejecting Data** section below.)
4. If a Timesheet correction is required after the payroll deadline, it can only be corrected by Employee Services. Corrections will not appear until the following payroll cycle. Please send an email to the Executive Administrator immediately upon discovery with details of the error and the correction requested.

Because the correction process is both labor intensive and time consuming, it is our goal to ensure that all time and attendance data reported by our employees is accurate when submitted and approved for payroll.

EXHIBIT 1 – Time Attendance & Reporting

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TAS ERRORS – When Submitting Requests & Timesheets (shown in red font)

Occasionally TAS will produce errors that appear in red font at the top of your screen. If you receive an error and cannot resolve it, please contact the Executive Administrator (not the IT Staff).

Incorrect **data entry** is the main cause for errors. One of the most common errors occurs when an employee attempts to submit a Timesheet for a work week that contains only leave hours and they fail to change the “Work Hours” pay element in the *Activity* column to “None.” The “Work Hours” pay element is automatically populated to the Timesheet as a default. If an employee has no Work Hours to enter and this pay element row is left blank, TAS interprets this as missing hours. Since no work hours need to be entered to the timesheet, the **Work Hours** field under *Activity* must be changed to “None.”

1. Using your mouse, select the drop down arrow (in the *Activity* column) next to **Work Hours** and change the default (“**Work Hours**”) to “None” (located at the top of the drop down list). Once this field is changed, the error is corrected and the Timesheet can be submitted successfully.

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MANAGER’S GUIDE FOR APPROVERS

It is the responsibility of each supervisor to review and approve all time and attendance records submitted by their subordinate(s) for payroll. A supervisor’s approval serves as the Certification of Payroll required in *Part 6, Chapter 106, Jacksonville Ordinance Code*. Therefore, supervisors should review the data carefully to ensure the information provided by the employee is correct and complies with all applicable laws, rules, regulations, and policies.

The TAS System refers to the supervisor as “Manager.” When an employee submits a request in TAS, the Manager (supervisor) is notified via email. Likewise, the employee is notified via email when the Manager approves or denies the request.

Upon receipt of an email notification, the Manager will select one of the two links provided within the body of the email. The first link opens the **Mass Approve Requests** option which provides the Manager the option to approve all pending requests at once. The second link opens only the individual pending request that prompted the email; by choosing this link, the Manager’s approval response only affects one specific request.

If the links provided within the body of the email fail, or a more comprehensive view of the employee’s record is preferred, the Manager can open the TAS System directly from the *Employee Portal*. It is recommended that Approvers not rely solely on email notifications to prompt their approval of pending requests in TAS. As the TAS submission deadline approaches, Approvers are encouraged to view **Mass Approve Requests** in TAS to ensure there are no pending requests. (Please see **Reviewing & Approving Data or Denying/Rejecting Data**, Steps 1 – 3a below.)

REVIEWING & APPROVING DATA OR DENYING/REJECTING DATA

1. Enter the web address <http://inside.coj.net> (within City Hall), or log in to <http://remote.coj.net> (outside of City Hall) to open the TAS System via the *Employee Portal* application.
2. Once the *Employee Portal* opens, under the **My Info** tab select the **Time and Attendance System** link located in the green banner on the right side of the page.
3. To Review and Approve/Deny pending requests:
 - a. To view all pending requests, under **Manage Requests**, select **Mass Approve Requests**. From this page, you can **Select All** or select the checkbox for specific requests and then select **Approve** to approve several requests at once. Likewise, you can select **Deny** or **Reject**. (*Deny & Reject* options vary for different types of requests.) Items not selected will not be affected.
 - b. To view an individual pending request, under **Manage Requests** select **Manage Requests and Timesheets**. Move your mouse to the request you want to review and select the field under *Activity Name*. The request will open in a new tab. Once the data has been reviewed, select **Approve** or **Deny/Reject**. Only the selected item will be affected.

EXHIBIT 1 – Time Attendance & Reporting

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4. To **reject** a request that has already been approved (prior to the TAS deadline), under **Manage Requests** select **Reject Approved Requests and Timesheets**. Select an option (Timesheet, Leave Requests, or Overtime Requests) and if applicable, enter the *Begin Date* (first day of the payweek – Saturday) and *End Date* (last day of the payweek – Friday). Select the request(s) to be rejected, enter the reason for rejection in the *Comments Section* (required), and **Reject**. The request is now void. If the employee is required to make changes, a new request must be submitted. No modification of recalled or rejected Leave Requests or Overtime Requests is permitted. However, Timesheets that have been recalled or rejected can be corrected and resubmitted.

NOTES: All Leave and Overtime Requests for the pay period must be approved or denied in TAS by the Manager prior to approving Timesheets. Failure to approve or deny these requests first will produce an error when trying to approve the timesheet. (If a request is denied or rejected, TAS requires the supervisor to enter the reason for denial in the *Manager's Comments* field.)

The Executive Administrator has access to approve all pending TAS requests for employees of the Office of City Council (providing that an Approver has not designated an alternate Approver in TAS). To request the Executive Administrator to perform TAS approvals, an email from the supervisor requesting the approval for the affected employee(s) is required.

TAS ERRORS – When Approving Requests & Timesheets (shown in red font)

Occasionally TAS will produce errors that appear in red font at the top of your screen. If you receive an error and cannot resolve it, please contact the Executive Administrator (not the IT Staff).

The most common TAS error occurs when an Approver attempts to approve a Timesheet while there are pending **Leave and/or Overtime Requests** for the correlating work week. All Leave and Overtime Requests must be approved prior to the approval of Timesheets. If the Timesheet contains any hours in blue font, this is an indication that requests related to the Timesheet are pending. Once all Leave and Overtime Requests are approved, all hours on the Timesheet will change to black font.

To review and approve pending requests, please follow Steps 1 – 3a under **Reviewing & Approving Data or Denying/Rejecting Data** above.)

SPECIAL TOOLS FOR MANAGERS

View Calendar

There are tools in TAS that are designed to help Managers determine work and leave schedules for their employees. The **View Calendar** tool (located on the Leave Request approval page) is especially helpful when considering Leave Requests submitted by employees. It provides an overall picture of pending and approved Leave Requests for the Manager's subordinate(s) in a calendar view format. **View Calendar** can also be selected under the **Manage Requests** at the top of the page.

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Out of Office

The *Out of Office* tool (located under *Manage Requests*) can be used by Managers to reassign their approval rights to another Manager. If a Manager is or will be unavailable to review and approve requests made by their employees before the established payroll deadlines, there are two options available to ensure employees are paid:

1. The Approver can request the Executive Administrator, via email, to approve pending requests made by their subordinate(s) for a specific pay period. (**Recommended** option.)
2. The Approver can set the *Out of Office* tool to designate another Manager (who must also have TAS approval rights) to perform these actions for them. Please note that once another Manager has been designated in TAS to approve the data for the employee, the Executive Administrator's approval access is automatically removed. If the designated Manager fails to approve the data in TAS by the deadline, the Executive Administrator will be unable to serve as a back-up Approver.

Managers have access to TAS remotely via <http://remote/coj.net>. However, if access to a computer is unavailable prior to the established deadline for approvals, requesting the Executive Administrator to approve TAS data or assigning another Manager for a specific time period will be necessary. Requesting assistance with TAS approvals should only be done:

1. if the absent Manager will not have access to a computer prior to established payroll deadlines,
2. after the designated back-up is made aware and has agreed to serve as a back-up approver, and
3. in accordance with the following reassignment structure:
 - a. Council Members may reassign approval authority to the Executive Administrator (recommended) via email request, or to another Council Member (in TAS).
 - b. the Council Director may reassign approval authority to the Executive Administrator (recommended) via email request, or to a Chief (in TAS).
 - c. Chiefs and other Supervisors may reassign approval authority to the Executive Administrator (recommended) via email request, or to another Chief or the Council Director (in TAS).

NOTE: The Executive Administrator has access to approve all pending TAS requests for employees of the Office of City Council. However, if approval authority is reassigned by one Manager to another in TAS, the Executive Administrator's approval access is automatically removed. This means that the Manager assigned to serve as the back-up Approver will be the only Approver with access for the designated period of time (and therefore must be available to approve requests for payroll).

EXHIBIT 1 – Time Attendance & Reporting

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Setting the Out of Office Tool (Temporary Reassignment of Approval Authority)

This action is not required for the Executive Administrator to perform the approval

1. Enter the web address <http://inside.coj.net> (within City Hall), or log in to <http://remote.coj.net> (outside of City Hall) to open the TAS System via the *Employee Portal* application.
2. Once the *Employee Portal* opens, under the **My Info** tab select the **Time and Attendance System** link located in the green banner on the right side of the page.
3. Under **Manage Requests**, select **Out of Office**.
4. In the *From* field, enter the first date that authority will be reassigned. In the *To* field, enter the last date that authority will be reassigned.
5. Enter the name of the Manager you've selected to approve TAS requests during your absence in the *Last Name* and *First Name* fields.
6. Using your mouse, select the drop down arrow for the *Department* field and select **CITY COUNCIL**. (Skip the *Division* field.)
7. Select **Save** and then **Return**. Failure to select **Return** at the end of the transaction will void the reassignment request.

QUICK REFERENCE GUIDES

Please review the *Quick Reference Guide for Employees* and the *Quick Reference Guide for Managers* for additional technical guidance if needed.

1. Enter the web address <http://inside.coj.net> (within City Hall), or log in to <http://remote.coj.net> (outside of City Hall) to open the TAS System via the *Employee Portal* application.
2. Once the *Employee Portal* opens, under the **My Info** tab select the **Time and Attendance System** link located in the green banner on the right side of the page.
3. Under **Help** (bottom left), select the guide you want to review. These references provide additional technical instructions for using the TAS System. However, please note that employees and Approvers of the Office of City Council are required to adhere to the procedures established for the department in order to comply with all policies, rules, and regulations of the Legislative Branch.

EXHIBIT 2 – Payroll Schedule

Pay Periods FY 2020-2021				
Payroll Number	Pay Date	1 Week Lag		TAS Data Approval Due By:
		Start	End	
1	10/2/2020	9/12/2020	9/25/2020	9/25/2020
2	10/16/2020	9/26/2020	10/9/2020	10/9/2020
3	10/30/2020	10/10/2020	10/23/2020	10/23/2020
4	11/13/2020	10/24/2020	11/6/2020	11/5/2020 * Thur by 5:00 PM
5	11/27/2020	11/7/2020	11/20/2020	11/18/2020 * Wed by 5:00 PM
6	12/11/2020	11/21/2020	12/4/2020	12/4/2020
7	12/25/2020	12/5/2020	12/18/2020	12/16/2020 * Wed by 5:00 PM
8	1/8/2021	12/19/2020	1/1/2021	12/31/2020 * Thur by 5:00 PM
9	1/22/2021	1/2/2021	1/15/2021	1/14/2021 * Thur by 5:00 PM
10	2/5/2021	1/16/2021	1/29/2021	1/29/2021
11	2/19/2021	1/30/2021	2/12/2021	2/11/2021 * Thur by 5:00 PM
12	3/5/2021	2/13/2021	2/26/2021	2/26/2021
13	3/19/2021	2/27/2021	3/12/2021	3/12/2021
14	4/2/2021	3/13/2021	3/26/2021	3/26/2021
15	4/16/2021	3/27/2021	4/9/2021	4/9/2021
16	4/30/2021	4/10/2021	4/23/2021	4/23/2021
17	5/14/2021	4/24/2021	5/7/2021	5/7/2021
18	5/28/2021	5/8/2021	5/21/2021	5/21/2021
19	6/11/2021	5/22/2021	6/4/2021	6/4/2021
20	6/25/2021	6/5/2021	6/18/2021	6/18/2021
21	7/9/2021	6/19/2021	7/2/2021	7/1/2021 * Thur by 5:00 PM
22	7/23/2021	7/3/2021	7/16/2021	7/16/2021
23	8/6/2021	7/17/2021	7/30/2021	7/30/2021
24	8/20/2021	7/31/2021	8/13/2021	8/13/2021
25	9/3/2021	8/14/2021	8/27/2021	8/27/2021
26	9/17/2021	8/28/2021	9/10/2021	9/10/2021

All time and attendance must be submitted and approved in TAS by 5:00 PM on dates shown, unless noted otherwise to accommodate a holiday.

*Elected Officials who entered office prior to July 1, 2019 are paid for the two-week period that ends on the payday. Elected Officials who entered office on or after July 1, 2019 will be paid according to the payroll schedule above.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan
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APPOINTED
OFFICIALS AND EMPLOYEES
SALARY
AND
EMPLOYMENT PLAN

10-1-90
10-7-91
8-10-98
7-1-02
8-08-03
12-20-06
4-17-15
2-19-19

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SECTION 1: OVERVIEW

- 1.1 The purpose of this Plan is to formalize a uniform salary and employment program for Appointed Officials and Appointed Employees.
- 1.2 It is the City's policy to pay a fair and equitable salary that is competitive with the market and based on the duties and responsibilities of each appointed position.
- 1.3 In accordance with City policy and law, the City provides equal opportunity in employment for all qualified persons and prohibits discrimination in employment.
- 1.4 This Plan has been approved by the Director of Employee Services of the Consolidated Government of Jacksonville and subsequent adjustments shall be consistent with public policy and shall be within allocated financial resources.
- 1.5 The Mayor has full authority to make exceptions to this Plan.
- 1.6 This Plan applies to Appointed Officials and Appointed Employees who are exempt from the Civil Service System as listed in Section 17.06 of the City Charter and Section 116.901 of the Municipal Ordinance Code. Appointed Officials and Appointed Employees serve at the pleasure of the appointing authority.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan

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SECTION 2: ADMINISTRATION OF THE PAY PLAN

2.1 Employment Rates

An individual who is appointed to serve as an official or employee of the Consolidated Government shall be paid at an amount determined by the Employer, however the rate of pay must fall within the salary range to which the position is assigned.

2.2 Salary Administration

- (1)** Appointed Officials' salary ranges shall be adjusted from time to time based on recommendation to the City Council and final action taken by the Council or with final approval by the Mayor or other appropriate authority for appointed positions not requiring Council approval.

Appointed Officials' salaries may be adjusted upward or downward as deemed appropriate by the Mayor or other appropriate appointing authority at the beginning of the fiscal year or at any time during the year for justifiable reasons which are reasonable and within financial resources and applicable salary ranges.

Pay grades, salary ranges and salaries for appointed officials will be established and maintained in accordance with Section 129 of the Ordinance Code.

- (2)** Appointed Employees' salary ranges shall be in writing and reported to the Director of Employee Services at the time of establishment for official records.

Appointed Employees' salaries shall be reviewed as necessary and appropriate adjustments upward or downward made pursuant to procedures established by the Mayor or other appropriate appointing authority.

- (3)** Compensation paid to Appointed Officials and Employees may be in the form of one-time payments rather than base pay.

2.3 Service (Longevity) Raises

For each five (5) years of continuous service with the City (computed from the date of initial employment), an employee shall receive an annual increase in salary of three hundred ten dollars (\$310). Continuous service shall be defined as employment which is creditable and without a break in service.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan

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For the purpose of this section, continuous service is defined as employment in a position authorized by the City Council or other appropriate authority and paid from salary funds with one or more departments or agencies of the City. Authorized leave of absence with or without pay and/or a break of up to twenty-four (24) months because of separation due to layoff shall not be considered a break in service.

"Creditable Service" is defined as service for which an employee was on the payroll in a position authorized by the City Council or other appropriate authority and paid from salary funds.

The Director of Employee Services may connect periods of broken service under the provisions of the Ordinance Code for the purpose of service (longevity) raises; however, no retroactive payment may be made as the result of approved time connections.

Service raises shall be in addition to any general or special raises which may be granted from time to time.

2.4 Employment Dates

- (1) **Adjusted Employment Dates:** An employment date shall be advanced when an employee is absent for one (1) day or a total of eight (8) hours cumulative, as applicable, in accordance with procedures established by the Director of Employee Services for adjusting employment dates.
- (2) **Time Connections:** The Director of Employee Services may connect periods of broken service for purposes of service (longevity) raises and vacation or annual leave accrual; however, no retroactive payment may be made as the result of approved time connection.

2.5 Incentive and Award Programs

- (1) In addition to regular wages provided under this Plan, the City may elect to establish incentive programs for its employees. If the City establishes such an incentive program, it may award cash and other awards to individuals or groups in order to recognize performance improvements, innovative ideas that result in savings or other benefits, improved safety records, or other similar work-related improvements.
- (2) The City may elect to establish financial incentives to encourage employees to obtain certain work-related certifications or other educational credentials. Incentives may take the form of supplemental pay or one-time or periodic payments. All affected employees will be equally eligible to qualify for, and receive, such incentives under the same terms and conditions.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan
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- (3) The City may elect to establish an "Employee Referral Program" with financial incentives to encourage current employees to refer candidates for employment in City jobs. Incentives will be in the form of one-time payments. All eligible employees may participate in such a program and receive incentives under the same terms and conditions.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan
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SECTION 3: OVERTIME

- 3.1** When possible, and with appropriate authorization, Appointed Officials and Employees should rearrange their work schedules within a work week to avoid working overtime. When an employee in an appointed position must work overtime hours, one of the following provisions will apply. For purposes of this section, "appropriate authority" shall mean the Chief Administrative Officer or his/her designee for department heads and the department head for division chiefs. For other Appointed Officials and Employees, it shall mean the individual given the authority to make appointments to that position.
- 3.2 Appointed Officials and Employees Exempt from the Overtime Provisions of, or Not Covered by, the Fair Labor Standards Act**
- (1) Appointed Officials and Employees who are exempt from the overtime provisions of, or not covered by, the Fair Labor Standards Act are expected to work the hours necessary to carry out the duties and responsibilities of their positions, which may include attendance at meetings after normal hours.
 - (2) From time to time it may be necessary for such employees to work hours beyond those referred to in 3.2(1) above. It is the intent of this section to prevent such employees from being unduly burdened with uncompensated overtime.
 - (3) When authorized by appropriate authority, employees who work beyond what is normally required may be compensated for such hours with straight compensatory time for all hours actually worked. Only actual hours worked shall be used in calculating the forty (40) hour a week threshold for determining appropriate overtime payment. Compensatory time may be accumulated to a maximum of eighty (80) hours.
 - (4) Exempt employees shall forfeit all accrued but unused compensatory time when they terminate. There shall be no payment for accrued but unused compensatory time.
- 3.3 Appointed Employees Not Exempt from the Overtime Provisions of the Fair Labor Standards Act**
- (1) When authorized by appropriate authority, Appointed Employees who are non-exempt from the overtime provisions of the Fair Labor Standards Act shall be entitled to earn compensation for overtime at the rate of one and one-half (1-1/2) hours for each hour actually worked in excess of forty (40) hours per workweek. Only actual hours worked shall be used in calculating the forty (40) hour a week threshold for determining appropriate overtime payment.

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- (2) Compensation for such employees shall be in the form of a cash payment unless compensatory time is mutually agreed upon between the employee and the appropriate authority.
- (3) Such employees may accrue up to eighty (80) hours of compensatory leave; once this maximum has been reached, compensation for additional overtime hours worked shall be in the form of cash payments.

3.4 Personal Assistants to Elected Officials

- (1) Appointed Employees who serve as personal assistants to Elected Officials are not covered by the Fair Labor Standards Act.
- (2) The provisions in 3.2 or 3.3 above may be applied to employees in such positions at the discretion of the Elected Official to whom they report. Designations for such positions shall be reported and maintained by the Employee Services Department.

EXHIBIT 3 – Appointed Officials & Employees Salary & Employment Plan
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SECTION 4: HOLIDAYS

- 4.1** The following twelve (12) paid holidays shall be observed as indicated each year:

Date	Observance
January First (1 st)	New Year's Day
Third Monday in January	Martin Luther King's Birthday
Third Monday in February	Presidents' Day
Last Monday in May	Memorial Day
July Fourth (4 th)	Independence Day
First Monday in September	Labor Day
November Eleventh (11 th)	Veterans' Day
Fourth Thursday in November	Thanksgiving
Friday after Thanksgiving	
December Twenty-Fourth (24 th)	Christmas Eve
December Twenty-Fifth (25 th)	Christmas Day
Personal Leave Day	(By mutual agreement)

- 4.2** When a holiday falls on Sunday, the following Monday shall be observed as the holiday. When a holiday falls on Saturday, the preceding Friday shall be observed as the holiday, provided, however, that when Christmas Eve falls on a Sunday, the following Tuesday shall be observed as the Christmas Eve holiday.
- 4.3** For employees on a four-day, ten-hour-day workweek, who normally work Monday through Thursday, Friday holidays will be observed on the preceding Thursday. For employees on a four-day ten-hour-day workweek, who normally work Tuesday through Friday, Monday holidays will be observed on the following Tuesday.
- 4.4** Employees scheduled for eight (8) or ten (10) hour days, shall be compensated for the holiday at their respective rates of pay for eight (8) or ten (10) hours.
- 4.5** The following shall apply when employees covered by this Plan are required to work on a holiday:
- (1)** In addition to straight time pay for all hours worked, exempt employees shall receive compensatory leave at the rate of one and-one-half (1-1/2) times the employee's straight time rate.
 - (2)** In addition to straight time pay for all hours worked, non-exempt employees shall receive compensatory leave or cash payments at the rate of one and-one-half (1-1/2) times the employee's straight time rate.

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- 4.6** The Personal Leave Day may be taken on any date during the fiscal year as mutually agreed upon by the employee and the department or agency head. If not taken during the fiscal year, the personal leave day will be forfeited.
- 4.7** An employee covered by this Plan shall receive payment for a paid holiday unless:
- (1)** he/she has an unexcused absence on the last work day preceding such holiday or on the next work day following such holiday; or
 - (2)** he/she is absent on any type of leave without pay on the last work day preceding such holiday and on the next work day following such holiday.
 - (3)** he/she is receiving a wage benefit from workers' compensation.

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SECTION 5: ANNUAL LEAVE PLAN E

This section shall apply to all employees covered by this Plan who were hired prior to October 1, 1987.

5.1 Method of Earning and Accruing Annual Leave

- (1) All full-time employees covered by this Plan shall earn annual leave in accordance with the following:

Upon Completion of Years of Continuous Service	Hours Accrued Per Year
0 thru 4	160
5 thru 9	184
10 thru 14	208
15 thru 19	232
20 thru 24	256
25 or more	280

- (2) Annual leave will accrue bi-weekly at the rate stated above and shall be credited on the last day of the pay period for all hours actually worked or hours on approved leave with pay. The maximum annual leave that may be accrued shall be 840 hours (105 days). Any excess over this amount shall be treated in accordance with Section 5.3. Accrual rates shall change to the higher rate on the first day of the pay period in which the employment date occurs. If the employee has an adjusted employment date, the accrual rate shall change at the start of the pay period in which the employee's adjusted service date occurs.
- (3) For employees being paid less than eighty (80) hours in a bi-weekly pay period, the bi-weekly accrual must be calculated by multiplying the hourly accrual rate times the number of hours for which the employee is being paid.

5.2 Use of Annual Leave

- (1) Annual leave should be used to provide periodic vacation; however, earned annual leave may be used for any other purpose when authorized by the appointing authority.
- (2) Use of annual leave shall be arranged so as to be mutually convenient to both the employee and the appointing authority.

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- (3) Employees may split their annual leave in any manner desired if approved by the appropriate appointing authority. The minimum amount of annual leave that can be taken and charged is one-half (1/2) hour.
- (4) Requests for personal leave must be submitted in writing at least two (2) weeks in advance for personal leave requests of forty (40) or more consecutive working/shift hours. Requests for personal leave of less than forty (40) consecutive working/shift hours must be submitted in writing for approval at least twenty-four (24) hours in advance, unless the personal leave is for illness or emergency. In the latter case, written requests shall be submitted as soon as practicable. These advance notice requirements may be waived by the department head. Requests for leave of any nature, as provided for above, shall not be unreasonably denied.

An employee must notify his/her supervisor as early as possible, and no later than thirty (30) minutes before starting time, the first day the employee is unable to report for work because of illness. The employee will notify the supervisor of the nature of the employee's illness and the approximate amount of time the employee will be absent. Use of personal leave for illness is subject to investigation by the appropriate supervisor. An employee will be counseled whenever a pattern clearly develops where an employee is abusing personal leave taken for illness. (Example: when leave for illness is combined with regular days off more than three (3) times annually or when leave is used on an unscheduled basis more than six (6) times annually.)

- (5) An employee will not be charged annual leave for a holiday that occurs while he/she is on approved leave.
- (6) Employees are encouraged to retain ten (10) days in their annual leave account in case of serious illness.

5.3 Payment for Annual Leave

- (1) **Sellback:** If an employee does not use all of the annual leave accrued in a fiscal year under Plan E, he/she may be paid for such difference on an hour-for-hour basis, or allow such difference to continue to accumulate for up to a maximum of 840 hours (105 days). The option to receive a cash payment for such leave is not available to an employee who would have less than eighty (80) hours annual leave remaining after such payment. Leave hours transferred to deferred comp will count as leave time used during the fiscal year. To receive such payment, the employee must make an irrevocable election in the fiscal year preceding the fiscal year in which the leave accrues, in accordance with administrative

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procedures established by the City of Jacksonville. Payments will be made on the first payday in December at the September 30 rate of pay.

- (2) **Rollback:** Annual leave in excess of 840 hours (105 days) shall either be paid on an hour-to-hour basis to the employee or, at the employee's option, may be placed in the employee's retirement leave account as provided in Section 6. These payments will be made on the second pay day in November at the September 30 rate of pay.
- (3) Upon separation from City service due to retirement or resignation, an employee shall be paid for all remaining accrued and unused annual leave.

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SECTION 6: PERSONAL LEAVE PLAN H

This article shall apply to all permanent, probationary and provisional employees employed on or after October 1, 1987.

6.1 Method of Earning and Accruing Personal Leave

- (1) Employees shall accrue personal leave for straight time hours worked in accordance with the following schedule:

Upon Completion of Years of Continuous Service	Hours Accrued Per Year
0 thru 4	160
5 thru 9	184
10 thru 14	208
15 thru 19	232
20 thru 24	256
25 or more	280

- (2) Employees shall accrue personal leave based on time actually worked and time on approved leave with pay.
- (3) Personal leave will be credited to the employee at the rate stated above on a bi-weekly basis. The leave shall be credited on the last day of the pay period.
- (4) The accrual rate shall change to the higher rate on the first day of the pay period in which the employment date occurs. If the employee has an adjusted employment date, the accrual rate shall change at the start of the pay period in which the employee's adjusted service date occurs.
- (5) Personal leave shall accrue to a maximum of 480 hours. Accrued and unused personal leave over 480 hours will be forfeited, except if applied in accordance with Section 6.2 below.

6.2 Critical Emergency Leave Bank

- (1) There shall be established a Critical Emergency Leave Bank (CELB). Any accrual over the maximum 480 hours allowed in the regular personal leave account shall be credited to the CELB account up to a maximum of 720 hours.
- (2) The CELB shall only be used for critical emergency illness or personal crisis. A critical emergency illness is defined as any incapacitating emergency illness requiring hospitalization and/or a recuperation period documented by a certified physician and/or hospital. A

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personal crisis is defined as a severe circumstance that directly impacts the employee. This may include a natural disaster impacting the employee's primary residence such as a fire or severe storm. Employee CELB usage requests that qualify under the personal crisis provision must be approved by the Director of Employee Services or the Elected Official's designee.

- (3) The CELB shall only be used for a critical illness or personal crisis of more than eighty (80) consecutive hours of the employee or member of his/her immediate family. Immediate family is defined as: spouse, child, parent, step-children, grandparent, grandchildren and siblings.
- (4) An employee may donate accrued CELB leave to another employee's CELB account under the City's Donated Leave policy and procedure.
- (5) Upon separation with greater than twenty (20) years of service, employees will be paid up to forty (40) hours of accrued CELB hours.

6.3 Use of Personal Leave

- (1) Employees, when eligible and authorized, may take personal leave for any reason they deem necessary. Personal leave may be taken only from accrued personal leave days earned.
- (2) Requests for personal leave must be submitted in writing at least two (2) weeks in advance for personal leave requests of forty (40) or more consecutive working/shift hours. Requests for personal leave of less than forty (40) consecutive working/shift hours must be submitted in writing for approval at least twenty-four (24) hours in advance, unless the personal leave is for illness or emergency. In the latter case, written requests shall be submitted as soon as practicable. These advance notice requirements may be waived by the Department Head. Requests for leave of any nature, as provided for above, shall not be unreasonably denied.
- (3) The minimum amount of personal leave to be taken and charged shall be one-half (1/2) hour.
- (4) An employee must notify his/her supervisor as early as possible, and no later than thirty (30) minutes before starting time, the first day the employee is unable to report for work because of illness. The employee will notify the supervisor of the nature of the employee's illness and the approximate amount of time the employee will be absent. Use of personal leave for illness is subject to investigation by the appropriate supervisor. An employee will be counseled whenever a pattern clearly develops where an employee is

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abusing personal leave taken for illness. (Example: when leave for illness is combined with regular days off more than three (3) times annually or when leave is used on an unscheduled basis more than six (6) times annually.)

- (5) Upon retirement (including vesting under the pension law), attainment of five (5) years of continuous service, or death of an employee, the employee shall be paid for all unused, accrued personal leave on an hour-for-hour basis.
- (6) Upon termination of an employee for other than retirement (including vesting under the pension law), if the employee has less than five (5) years of continuous service, the employee shall be paid for seventy-five percent (75%) of all unused personal leave on an hour-for-hour basis.
- (7) Once an employee's resignation or notice of retirement has been offered and accepted, "running out" leave is prohibited. "Running out" shall be defined as greater than 2 weeks of consecutive leave immediately prior to the resignation or retirement date.

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SECTION 7: PERSONAL LEAVE PLAN P

7.1 This article shall apply to all permanent, probationary and provisional employees employed on or after January 10, 1989, who previously were covered by the IAFF and FOP contracts but who have promoted to an Appointed Official or Appointed Employee position.

7.2 Method of Earning and Accruing Personal Leave

- (1) Employees shall accrue personal leave with pay for straight time hours worked in accordance with the following schedule:

Upon Completion of Years of Continuous Service	Hours Accrued Per Year
0 thru 4	160
5 thru 9	184
10 thru 14	208
15 thru 19	232
20 thru 24	256
25 or more	280

- (2) Employees shall earn leave time based on time actually worked and time on approved leave with pay.
- (3) Personal leave will be credited to the employee at the rate stated above on a bi-weekly basis. The leave shall be credited on the last day of the pay period.
- (4) The rate of accrual shall change to the higher rate on the first day of the pay period in which the employment date occurs. If the employee has an adjusted employment date, the accrual rate shall change at the start of the pay period in which the employee's adjusted service date occurs.
- (5) Personal leave shall accrue to a maximum of six hundred (600) hours. Accrued and unused personal leave over six hundred (600) hours will be forfeited. However, at the end of the fiscal year, accrued and unused personal leave in excess of six hundred (600) hours may be sold back to the Employer to the extent that the employee had timely requested but was not permitted by Management to take the leave during that year. Such leave shall be sold back to the Employer at the employee's rate of pay at the end of the fiscal year. Leave Plan P employees may be paid in accordance with the FOP or IAFF collective bargaining agreement.

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7.3 Use of Personal Leave

- (1) Employees, when eligible and authorized, may take personal leave for any reason they deem necessary. Personal leave may be taken only from accrued personal leave days earned.
- (2) Requests for personal leave must be submitted in writing at least two (2) weeks in advance for personal leave requests of forty (40) or more consecutive working/shift hours. Requests for personal leave of less than forty (40) consecutive working/shift hours must be submitted in writing for approval at least twenty-four (24) hours in advance, unless the personal leave is for illness or emergency. In the latter case, written requests shall be submitted as soon as practicable. These advance notice requirements may be waived by the Department Head. Requests for leave of any nature, as provided for above, shall not be unreasonably denied.
- (3) The minimum amount of personal leave to be taken and charged shall be one-half (1/2) hour.
- (4) An employee must notify his/her supervisor as early as possible, and no later than thirty (30) minutes before starting time, the first day the employee is unable to report for work because of illness. The employee will notify the supervisor of the nature of the employee's illness and the approximate amount of time the employee will be absent. Use of personal leave for illness is subject to investigation by the appropriate supervisor. An employee will be counseled whenever a pattern clearly develops where an employee is abusing personal leave taken for illness. (Example: when leave for illness is combined with regular days off more than three (3) times annually or when leave is used on an unscheduled basis more than six (6) times annually.)
- (5) Upon retirement or termination following the completion of five (5) years of service, the employee shall be paid for all unused accrued personal leave on an hour-for-hour basis. Such employees shall have the option of using accrued personal leave immediately after or prior to their desired eligible retirement date and then be paid for the remainder of such leave at the employee's option.
- (6) Upon termination of employment with less than five (5) years of service for other than retirement, the employee shall be paid for seventy-five percent (75%) of all unused accrued personal leave on an hour-for-hour basis.

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SECTION 8: LEAVE DONATIONS

An employee may voluntarily donate leave to another employee in accordance with Employee Services Directive 0302 Leave Donations.

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SECTION 9: DEATH BENEFITS PAYMENT

- 9.1** In the event of an employee's death, payment shall be made to the employee's designated next of kin or estate, as determined in accordance with the law for the following:
- (1)** all accrued regular and overtime hours;
 - (2)** all unused leave on an hour-for-hour basis, as though the employee had retired;
 - (3)** if death occurs on the job, one (1) month's salary, in addition to all other benefits;
 - (4)** one (1) month's salary if the employee is not entitled to any benefits as indicated in above;
 - (5)** any other benefits to which the employee is entitled by law.

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SECTION 10: ABSENCE WITHOUT PAY

Approval of requested Family and Medical Leave, which means leave for a serious medical health condition for the employee or the employee's spouse, child or parent (including in loco parentis) or after the birth or placement of a child, shall be in accordance with the Family and Medical Leave Act and procedures established by the Director of Employee Services.

- 10.1** Upon request, the appointing authority may grant an employee leave without pay for personal reasons for a period or periods not to exceed ten (10) consecutive workdays. Documentation of absence without pay shall be furnished to the Employee Services Department to adjust the employee's employment date in accordance with procedures established by the Director of Employee Services.
- 10.2** A leave of absence without pay for more than ten (10) consecutive work days, deemed to be beneficial to the service of the City, may be granted by the appointing authority subject to the following:
- (1)** The total duration of such leave and any extensions granted shall not exceed one (1) year.
 - (2)** A leave of absence request must be completed and processed in accordance with procedures established by the Director of Employee Services.
 - (3)** If the leave of absence is for health reasons, the request must be accompanied by documentation from a licensed medical physician which must state the length of time that the employee should be on leave from his/her duties. Upon returning to work, the employee must furnish medical documentation of ability to perform assigned duties or, for an employee with a disability, the ability to perform the essential functions of the job with or without reasonable accommodation.
 - (4)** Appropriate documentation must be furnished to the Director of Employee Services so that the official personnel file will reflect the employee's current status and, upon the employee's return to work, the employment date must be adjusted in accordance with procedures established by the Director of Employee Services.
 - (5)** An employee who is granted a leave of absence without pay shall be an inactive employee of the City while on such leave and shall be returned to the same or a comparable position upon termination of the approved leave of absence.

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- (6) An employee who fails to return from a leave of absence will be deemed to have resigned as of the date the leave commenced and such failure to return from leave shall be documented.

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SECTION 11: LIMITED EMERGENCY

In the event of the official declaration of a local emergency or other event as declared by the City Elected Official, it is understood that operational needs may affect some employees differently from others. All employees may be utilized as needed to assist in emergencies as determined by the Employer. Employees will be notified by their supervisor as to their status.

- 11.1 Employees who are not required to work are designated as "non-essential" and released from duty shall be granted administrative leave for the balance of their normal shift and for such additional time as authorized by the Mayor.
- 11.2 Essential employees are those who are required to assist in emergencies as determined by the Employer. Employees designated as "essential" shall be required to work during the emergency. Essential employees who fail to meet their responsibilities under this provision may be subject to discipline.
- 11.3 When possible in situations where there is advance notice of an impending emergency, the Employer may authorize employees to take reasonable time, as determined by the Employer, to return home to secure their homes and property and arrange for the safety of their families. Employees will not be charged leave for any such authorized preparation time taken. Following such preparation time, employees must report to work during the emergency.
- 11.4 An employee's designation as "essential" or "non-essential" may change due to the nature of the emergency.
- 11.5 Employees who reported to work shall be paid in accordance with Section 3.
- 11.6 In addition, employees designated essential to the operation who reported to work shall be granted straight time compensatory time for the same number of hours given to employees on administrative leave during the emergency. This compensatory time shall not count against the overtime maximum specified in Section 3.
- 11.7 Employees on previously-approved leave, scheduled holiday, authorized leave without pay, or who called in to request leave during the emergency shall be charged for the leave.
- 11.8 In non-emergency situations in which employees are requested to leave early to accommodate special events, employees may use annual leave or modify their work schedules, within operational requirements and with the approval of their supervisor. At the Employers discretion, there may be times when the employee may not be charged annual leave.

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- 11.9 During a declared emergency by the Mayor and/or Sheriff, or when an emergency may reasonably be determined to be imminent, provisions of this Agreement may be suspended by the Mayor and/or the Sheriff during the time of the declared emergency provided that wage rates and monetary fringe benefits shall not be suspended.

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SECTION 12: JURY/WITNESS SERVICE

12.1 Jury Duty

An employee who is summoned to jury duty shall be granted leave with pay for all hours required for such duty not to exceed the number of hours in the employee's normal workday; however, if jury duty does not require absence for the entire workday, the employee shall return to work immediately upon release by the court.

If necessary, the employee's work schedule shall be rearranged to accommodate the days and times required for court attendance.

Jury fees, if any, shall be retained by the employee. The department or agency shall not reimburse the employee for meals, lodging, and/or travel expenses incurred while serving as a juror.

An employee who is required to report for jury service more than four (4) hours after the scheduled beginning of his/her work day, must report to work prior to the beginning of jury service. Employees will be given reasonable travel time to jury service location.

12.2 Witness Service

- (1) An employee who is absent from work in order to serve as a witness in a criminal case in a court of law to which he/she is not a party, either directly or as a member of a class, where such absence is in response to a legally valid subpoena, shall be granted leave with pay for those hours for which he/she is absent from work during his/her regularly scheduled working hours, provided he/she submits evidence of such service as a witness.
- (2) When an employee is called to testify as a result of his/her City duties, such appearance shall be considered a part of the employee's job assignment. All time spent in such legal proceedings shall be compensated in accordance with Section 3. Per diem and travel expenses shall be paid. The employee is required to return any fees received. The employee must provide evidence of subpoena and witness service.
- (3) When an employee is engaged in personal litigation or service as a paid expert witness, the employee may be granted annual leave with the approval of the appointing authority.

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SECTION 13: BEREAVEMENT AND FUNERAL LEAVE

- 13.1** Upon the death of a member of an employee's immediate family, or the immediate family of the employee's spouse, an employee may be granted up to five (5) days (not to exceed 40 working hours) paid bereavement leave, not otherwise chargeable. If additional time is required, annual leave may be approved.

The Employer will require the employee to supply documentation of the death prior to approval of the bereavement leave request.

Definition of Immediate Family

"Immediate Family" Defined	
spouse	
children	including step-children and children's spouses
parents	including step-parents
brothers and sisters	including half- and step-siblings
aunts and uncles	
nieces and nephews *	
grandparents	
grandchildren	
other relatives who permanently reside with the employee	
Also applies to the same relatives of the spouse of the employee	
<u>* Nieces and nephews will have a maximum of two (2) days</u>	

- 13.2** Employees may be granted four (4) hours without loss of pay as funeral leave to attend the funeral of a coworker (active or retired) from the same department or agency.

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SECTION 14: MILITARY LEAVE FOR TRAINING AND ACTIVE DUTY

Leave of absence and re-employment rights of employees inducted into the military service shall be as provided in the Uniformed Services Employment and Re-employment Rights Act of 1994 (USERRA), Florida Statutes and Florida Administrative Code.

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SECTION 15: WORKERS' COMPENSATION

- 15.1** Employees who have served six (6) months of continuous creditable and satisfactory service and who sustain a temporary disability as a result of accidental injury in the course of and arising out of employment shall, in addition to compensation payable pursuant to the Workers' Compensation law of the State of Florida, be granted the following benefits:
- (1)** For up to twenty (20) working days following such disability, the employee shall receive supplemental pay in an amount equal to the difference between his/her net take-home pay and the workers' compensation wage benefit payable. (For purposes of this section, net take-home pay is defined as the amount of the employee's regular straight-time wages reduced by the amount deducted from the employee's pay for taxes and social security.) Provided, however, that in no event shall any employee realize more than his/her net after-tax take-home pay as a result of receiving both workers' compensation and supplemental pay.
 - (2)** Thereafter, the Director of Finance may, at his/her sole discretion, grant continued supplemental pay, in increments of up to twenty (20) working days.
- 15.2** An employee who is absent from duties due to an on-the-job injury and who is not receiving supplemental pay, may request use of sick or vacation/annual/personal leave for the purpose of maintaining regular pay status. The amount of leave to be charged in such cases is the minimum amount in hourly increments that will equal the difference between Workers' Compensation payments and the employee's regular pay.
- 15.3** Any employee serving in the first six (6) months of original employment, who is temporarily totally disabled as a result of injury received in the performance of duty with the City, shall receive the benefits to which he/she is entitled under the Workers' Compensation Laws of the State of Florida.
- 15.4** An employee who is temporarily partially disabled from performing the duties of his/her position due to an on-the-job injury may be temporarily reassigned without reduction of pay to other suitable and available duties commensurate with the employee's medical fitness.
- 15.5** Appointed officials and employees who are sworn law enforcement officers, certified corrections officers or certified firefighters may be entitled to additional benefits under applicable state or local law.

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- 15.6** If an employee is eligible for monetary benefits under workers' compensation, normal payroll deductions will continue from workers' compensation benefits to avoid interrupting employer provided benefits such as pension and healthcare.

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SECTION 16: EMPLOYEE BENEFITS

- 16.1** The **Employer** will provide a choice of comprehensive group health plans which will include at least one designated no cost to the employee plan. Employees will be required to pay five percent (5%) of the actual cost (not to exceed thirty dollars (\$30) per month) of any health plan selected other than the designated no cost plan(s) from which the employee may select. In addition, the **Employer** will pay fifty percent (50%) of the cost of the comprehensive medical coverage for eligible dependents; the employee will pay the remaining fifty percent (50%) of the cost.
- 16.2** The Employer agrees to pay a premium of up to fifteen dollars (\$15) per month, per employee covered by this Agreement, for the purpose of providing partial payment toward a comprehensive dental health plan for said employees. The Employer may make an administrative charge not to exceed four cents per deduction.
- 16.3** The City may provide, at no expense to the employee, term life insurance coverage equal to twice the employee's gross annual salary rounded up to the nearest thousand.
- 16.4** Employees may exercise the option to pay the cost to obtain group term life insurance coverage under the same policy for an additional amount equal to one times the employee's annual salary, rounded up to the nearest thousand (subject to conditions and limitations of provider). Benefits may be reduced at age 70 to 65% of benefits under the Policy and in compliance with the Age Discrimination in Employment Act (ADEA).
- 16.5** The City shall contribute to the employee's pension program to the extent required by applicable laws.
- 16.6** Appointing Authorities may authorize the payment of job-related association dues, fees, subscriptions and certifications for employees, if deemed to be in the public interest.
- 16.7** The City recognizes the importance of our employee's families and the value of time during the birth or adoption of a child. In this spirit, the City will offer a parental leave plan consisting of paid time off following the birth or adoption of a child.
- The City will establish policies and procedures for administering the Parental Leave Plan as outlined in applicable Employee Services Directive.
- 16.8** The City recognizes the importance of continuing education in providing equitable employment opportunities, employee growth and agrees to a mutual commitment of education for employees.

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In accordance with Section 106.901 of the Ordinance Code, the City may establish a Career Development Program. The City may reimburse employees for eligible tuition expenses in order to enhance the quality of the existing workforce, attract and retain qualified candidates for City employment, and to ensure that City employees have access to education that will equip them to do the work that will be needed during their careers with the City of Jacksonville.

Reimbursement will be in accordance with established policies and procedures which will cover, among other things, time limits for submission of requests, eligible coursework, and required documentation.

This program is dependent upon funding.

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SECTION 17: DRUG AND ALCOHOL ABUSE

The City of Jacksonville is committed to a Drug-Free Workplace for the health and safety of employees and citizens of the City of Jacksonville. The City has adopted a Zero-Tolerance policy for using or being under the influence of alcohol or illegal drugs or having within one's system the metabolites of illegal drugs in accordance with Employee Services Directive 0401 Drug Free Workplace Policy.

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SECTION 18: SEPARATION

- 18.1** Appointed Officials and Employees serve at the pleasure of the Appointing Authority. Except as provided in Section 18.2 below, or in accordance with Section 17 of the City Charter, any Appointed Official or Employee may be separated from employment at any time, with or without cause, and may, at the discretion of the Appointing Authority, be granted severance pay upon separation with approval of the Director of Employee Services for departments under the mayor's authority. The appropriate budgeting authority must certify the availability of funds for any severance pay to be granted.
- 18.2** Appointed Employees who have been granted protection from dismissal without cause may only be separated from employment for cause as provided in the Civil Service and Personnel Rules and Regulations. Any form of discipline other than dismissal shall be at the discretion of the Appointing Authority.

III. INSURANCE

A. Insurance Benefits Summary

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2021 INSURANCE PLANS & OTHER BENEFITS HEALTH, DENTAL, VISION, LIFE, & FLEXIBLE SPENDING ACCOUNTS

The following information is provided as a summary of benefits only. Specific details regarding all insurance coverage and premiums can be found at <http://www.coj.net/benefits>.

HEALTH

The City's health benefit providers for the calendar year 2021 are **Florida Blue** (a division of Blue Cross/Blue Shield of Florida) and **UF Health**.

Employees have three (3) **Florida Blue** health plans to choose from: an HMO, a PPO, and an HDP (High Deductible Plan). The HMO Plan is an Open Access plan, meaning referrals are not required for most specialists. The PPO plan provides access to Mayo, the HMO plan does not. And the HDP plan provides a plan at \$0.00 cost to the employee for *Employee Only* coverage.

The **UF Health Direct Care** plan (EPO) covers services provided within the UF Health Network. Premiums are equivalent to those of the Florida Blue High Deductible Plan (HDP), and the out-of-pocket costs for services is a hybrid of the Florida Blue HMO and PPO plans. *See attached Health Plan Comparison chart.*

NOTE: TRICARE ONLY (There is a **TRICARE Supplement Plan available for 2021 offered by Selman & Company**. If you have TRICARE coverage and want more information about this supplement plan, please visit the Employee Benefits web site at <http://www.coj.net/benefits>, or contact Employee Benefits directly at 255-5555.

BlueCare (HMO) Coverage Summary (BlueCare 48)

- You must select a Primary Care Physician (PCP)
- No Referrals required from your PCP for Specialists (some restrictions do apply)
- Co-payments for doctor visits, prescriptions, and urgent care centers
- Changes to Primary Care Physician effective become effective 1st of the month following request if request made prior to the 15th of the month. Requests made on or after the 15th of the month do not become effective until the 1st of the second month after request is made (6 weeks out)

Cost for Services

Primary Care Physician	\$25
Specialist	\$35
Routine Annual Physical (One per Year)	No Charge
GYN (Routine Annual Exam)	No Charge
OB/GYN (Other Visits)	\$35
Routine Mammogram	No Charge
Urgent Care Centers	\$30
Independent Clinical Lab	No Charge

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Independent X-Ray	\$30	
Complex Imaging (MRI, MRA, CT & PET Scans)	\$300	
Other Diagnostic Services	\$30	
Emergency Room (Waived if admitted)	\$300 plus 30%	
Inpatient/Outpatient Hospitalization/Surgery	30% after deductible	
Deductible	Individual (\$300)	Family (\$600)
Out-of-Pocket Maximum (Calendar Year)	Individual (\$2,500)	Family (\$5,000)

Prescriptions

Generic	\$10
Brand Name	\$40
Non-Preferred/Brand	\$75
Mail Order (90-day Supply)	\$20-Generic, \$80-Brand Name, & \$150-Non-Preferred/Brand

Co-payments and Deductibles count toward the Annual Out-of-Pocket Maximum. Co-payments do not count toward Deductibles. Prescriptions do count toward Annual Out-of-Pocket Maximum or Deductible.

BlueOptions (PPO) Coverage Summary (BlueOptions PPO 05782)

- This is a true PPO Plan with both In-Network and Out-of-Network coverage
- In-Network and Out-of-Network benefits have separate Deductibles and Annual Out-of-Pocket Maximums
- No Referrals required for Specialists

Cost for Services

In-Network

Primary Care Physician	\$30	
Specialist	\$40	
Adult & Child Wellness	No Charge	
Routine Annual Physical (One per Year)	No Charge	
GYN (Routine Annual Exam)	No Charge	
OB/GYN (Other Visits)	\$40	
Routine Mammogram	No Charge	
Urgent Care Centers	\$35	
Independent Clinical Lab	No Charge	
Independent X-Ray	\$35	
Complex Imaging (MRI, MRA, CT & PET Scans)	\$300	
Other Diagnostic Services	\$35	
Emergency Room (Waived if admitted)	\$300 plus 30%	
Inpatient/Outpatient Hospitalization/Surgery	30% after deductible	
Deductible In-Network (Calendar Year)	Individual (\$750)	Family (\$1,500)
Out-of-Pocket Maximum (Calendar Year)	Individual (\$6,000)	Family (\$12,000)

A. Insurance Benefits Summary

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Out-of-Network

Primary Care Physician	50% after deductible	
Specialist	50% after deductible	
GYN (Routine Annual Exam)	50% (no deductible)	
Routine Mammogram	No Charge	
Urgent Care Centers	50% after deductible	
Emergency Room (Waived if admitted)	\$300 plus 30%	
Inpatient/Outpatient Hospitalization/Surgery	50% after deductible	
Deductible Out-of-Network (Calendar Year)	Individual (\$1,000)	Family (\$2,000)
Out-of-Pocket Maximum (Calendar Year)	Individual (\$9,000)	Family (\$18,000)

Prescriptions – In-Network

Generic	\$10
Brand Name	\$40
Non-Preferred/Brand	\$75
Mail Order (90-day Supply)	\$20-Generic, \$80-Brand Name, & \$150-Non-Preferred/Brand

In-Network and Out-of-Network Co-payments and Deductibles are applied separately toward the different Annual Out-of-Pocket Maximum amounts. Co-payments do not count toward Deductibles. Prescriptions do count toward Annual Out-of-Pocket Maximum or Deductible.

BlueCare HMO HDHP (HDP – High Deductible Plan) Coverage Summary (BlueCare 65)

- No-cost plan for Employee Only coverage
- Co-payments for Routine Office, Urgent Care Center Visits, & Prescriptions only
- No Referrals required from your PCP for Specialists
- Emergency Room cost - 30% after deductible
- High Deductible must be met prior to coverage for non-routine tests and events

Cost for Services

In-Network Only

Primary Care Physician	\$25
Specialist	30% after deductible
Adult & Child Wellness	No Charge
Routine Annual Physical (One per Year)	No Charge
GYN (Routine Annual Exam)	No Charge
OB/GYN (Other Visits)	30% after deductible
Routine Mammogram	No Charge
Urgent Care Centers	\$25
Independent Clinical Lab	No Charge
Independent X-Ray	30% after deductible
Complex Imaging (MRI, MRA, CT & PET Scans)	30% after deductible
Other Diagnostic Services	30% after deductible
Emergency Room	30% after deductible
Inpatient/Outpatient Hospitalization/Surgery	30% after deductible

A. Insurance Benefits Summary

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Deductible (Calendar Year):	Individual (\$1,500)	Family (\$3,000)
Out-of-Pocket Maximum (Calendar Year):	Individual (\$5,000)	Family (\$10,000)

Prescriptions – In-Network

Generic	\$10
Brand Name	\$40
Non-Preferred/Brand	\$75
Mail Order (90-day Supply)	\$20-Generic, \$80-Brand Name, & \$150-Non-Preferred/Brand

Co-payments and Deductible count toward the Annual Out-of-Pocket Maximum. Co-payments do not count toward \$1,500 Deductible. Prescriptions do count toward Out-of-Pocket Maximum or Deductible.

UF HEALTH DirectCare (EPO) Coverage Summary

- No-cost plan for Employee Only coverage
- Co-payments for Routine Office, Urgent Care Center Visits, & Prescriptions only
- No Referrals required from your PCP for Specialists
- Emergency Room cost - 20% after deductible
- Deductible must be met prior to coverage for non-routine tests and events

Cost for Services

In-Network Only

Primary Care Physician	\$10	
Specialist	\$30	
Adult & Child Wellness	No Charge	
Routine Annual Physical (One per Year)	No Charge	
GYN (Routine Annual Exam)	No Charge	
OB/GYN (Other Visits)	\$30	
Routine Mammogram	No Charge	
Urgent Care Centers	\$25	
Independent Clinical Lab	No Charge	
X-Rays	\$30.00	
Complex Imaging (MRI, MRA, CT & PET Scans)	\$100.00	
Other Diagnostic Services	20% after deductible	
Emergency Room	20% after deductible	
Inpatient/Outpatient Hospitalization/Surgery	20% after deductible	
Deductible (Calendar Year):	Individual (\$250)	Family (\$500)
Out-of-Pocket Maximum - Medical (Calendar Year):	Individual (\$1,500)	Family (\$2,000)
Out-of-Pocket Maximum – Pharmacy (Calendar Year):	Individual (\$1,000)	Family (\$2,000)

A. Insurance Benefits Summary

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Prescriptions – In-Network

Generic	\$10
Brand Name	\$40
Non-Preferred/Brand	\$75
Mail Order (90-day Supply)	\$20-Generic, \$80-Brand Name, & \$150-Non-Preferred/Brand

Health Insurance Premiums 2021 (Payroll Deduction – 24 times per year)

COVERAGE	HMO	PPO	HIGH DED PLAN	UF DIRECT CARE
Employee Only	\$14.82	\$15.00	\$0.00	\$0.00
Employee & Spouse	\$171.61	\$194.41	\$147.74	\$147.74
Employee & Children	\$150.73	\$170.47	\$128.03	\$128.03
Employee & Family	\$320.05	\$364.42	\$287.93	\$287.93

FLORIDA BLUE CONTACT INFORMATION (Group # B3267)

Employee Benefits Office On-Site Representative - Denis Woods	(904) 255-5555	Monday thru Friday / 7:30 am – 4:30 pm
Florida Blue Customer Service	(800) 664-5295	Monday thru Thursday 8 am – 6 pm Friday 9 am – 6 pm
PrimeMail (Mail Order Prescriptions)	(888) 849-7865	24 hours per day / 7 days per week

www.floridablue.com

UF DIRECT CARE CONTACT INFORMATION

Assistance with On-Line Provider Directory	ClaimsBridge	(888) 960-7809
Assistance with Coverage or Claims	Integra Administrative Group	(800) 959-3518
	www.integratpa.com	

TELEMEDICINE OPTIONS (NEW)

Teladoc – For employees enrolled in any of the three **Florida Blue Plans**

What: 24/7 appointments for phone, video or mobile app visits lasting 30 minutes or less

Cost: \$15 for BlueCare 38 & 65 Plans; \$20 for BlueOptions 5782 Plan

Contact: 1.800.835.2362 or website www.Teladoc.com

A. Insurance Benefits Summary

(Page 6 of 9)

UF Health Virtual Visit Program – Only for employees enrolled in the **UF Health Plan**

What: Appointments for phone, video or mobile app visits lasting 30 minutes or less

Cost: \$10 for virtual visit with a PCP; \$30 for virtual visit with a specialist

Contact: 904.383.1052 or website www.UFHealthJax.org/virtual-visit

For more detailed information regarding telemedicine options, please refer to the Employee Benefits web page – from the Employee Portal select *Departments, Employee Services, Employee Benefits*.

DENTAL

The City's dental benefit provider for 2021 is **Delta Dental**.

Coverage Summary (DHMO – DeltaCare USA, Group# 78758)

- Functions as an HMO
- Select a Dentist from list of providers
- Free Examinations, X-Rays, and Cleanings (Cleaning once every 6 months)

Coverage Summary (DPPPO - Delta Dental PPO - Silver, Gold, & Platinum Plans – Group# 18491)

- Two plans in one – In-Network (Preferred Provider) and Out-of-Network (No Contractual Agreement with Delta Dental)
- In-Network
 - Select any Delta Dental Preferred Dentist
 - Free Examinations, X-Rays, and Cleanings (Cleaning once every 6 months)
 - Preferred Dentist will normally file claim forms for you
 - Rates are covered under contract with Delta Dental
- Out-of-Network
 - Select any Dentist
 - Rates are not covered by contract (You file claim forms and reimbursement amount will be based on Delta Dental's approved rate; may not cover entire charges from dentist which you are responsible for paying.)
- Premiums and Coverage increase with each plan, beginning with "Silver" which is the least expensive plan with minimal coverage, followed by the "Gold" plan and ending with the "Platinum" plan. See Employee Benefits website for specifics.

Dental Insurance Premiums 2021 (Payroll Deduction – 24 times per year)

COVERAGE	DHMO	PPO SILVER	PPO GOLD	PPO PLATINUM
Employee Only	\$0.00	\$2.83	\$9.03	\$13.71
Employee & Spouse	\$4.87	\$13.17	\$25.57	\$34.94
Employee & Children	\$7.15	\$18.72	\$34.49	\$46.32
Employee & Family	\$13.64	\$27.81	\$48.96	\$64.95

A. Insurance Benefits Summary

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DELTA DENTAL MEMBER SERVICES		
On-Site Representative		(904) 255-5555
DHMO Group # 78758 Customer Service (800) 422-4234	www.deltadentalins.com	DPPO Group # 18491 Customer Service (800) 521-2651

VISION

The City's vision benefit provider for 2021 is VSP. VSP provides two plans.

Coverage Summary **Vision Plan Basic**

- Exams every 12 months / \$10 Copay
- Lenses, Frames OR Contacts Lenses every 24 months / \$20 Copay
- **Select a doctor from list of providers***
- Lenses and Frames covered up to \$110 every 24 months and 20% off the amount over \$110; \$60 allowance at Walmart/Sam's Club/Costco
- Elective Contact Lenses (materials only) covered up to \$110
- Medically Necessary Contact Lenses covered in full

Coverage Summary **Vision Plan Premier**

- Exams (\$10 Copay) and Lenses (\$20 Copay) every 12 months
- Frames every 24 months OR Contact Lenses every 12 months
- **Select a doctor from list of providers***
- Frames covered up to \$130 every 24 months and 20% off balance; \$70 allowance at Walmart/Sam's Club/Costco
- Elective Contact Lenses (materials only) covered up to \$130
- Medically Necessary Contact Lenses covered in full

***NOTE:** Both plans include an Out-of-Network benefit – see Jax Benefits Guide 2021 for more details.

Vision Insurance Premiums 2021 (Payroll Deduction - 24 times per year)

COVERAGE	BASIC PLAN	PREMIER PLAN
Employee Only	\$1.80	\$3.50
Employee & Spouse	\$3.44	\$6.63
Employee & Children	\$3.22	\$5.26
Employee & Family	\$5.50	\$8.96

NOTE: You must inform the doctor's office that you are a VSP member prior to making your appointment. If you fail to do so, your visit may not be covered by VSP. Information regarding additional discounts and Out-of-Network coverage for VSP members can be found on the Employee Benefits web page – from the Employee Portal select *Departments, Employee Services, Employee Benefits*.

A. Insurance Benefits Summary

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VSP MEMBER SERVICES		
GROUP # 30099995		
(800) 877-7195	www.vsp.com	View Provider list

LIFE

Active Employees

Elected Officials automatically receive an amount equal to two times their annual salary in life insurance benefits at no cost to the Official. Employees of the City Council also receive an amount equal to two times their annual salary at no cost to the employee in accordance with Section 16.3 of the *Appointed Officials and Employees Salary and Employment Plan*.

Employees may purchase additional coverage by selecting to add an amount equal to one, two, or three times their annual salary. Premiums are calculated using a predefined scale. Supplements must be purchased in increments equal to one year's salary.

Life Insurance Premiums 2021 (Payroll Deduction - 24 times per year)

AGE	PER \$1,000 PER PAY PERIOD
< 30	\$0.06
30 - 34	\$0.11
35 - 39	\$0.17
40 - 55	\$0.21
55 +	\$0.25

*Active employees Life Insurance will be reduced to 65% of coverage at the end of the year which they turn 70 years of age.

Dependent Life Insurance for Spouse & Children 2021 (Payroll Deduction - 24 times per year)

BENEFIT	PER PAY PERIOD
\$10,000 Spouse / \$5,000 each Child	\$1.34
\$20,000 Spouse / \$10,000 each Child	\$2.68

THE STANDARD MEMBER SERVICES		
GROUP # 750973		
(800) 628-8600	www.standard.com	Contact the City Employee Benefits for Claims

A. Insurance Benefits Summary
(Page 9 of 9)

FLEXIBLE SPENDING ACCOUNTS

The City's Flexible Benefits Plan is an IRS sanctioned, City Council approved, tax-free benefit program. There are currently three types of flexible spending accounts offered by the City:

Medical Reimbursement
Dependent Care Reimbursement
Transportation/Parking Reimbursement

The City's current service provider for the flexible benefits program is *Discovery Benefits*. Additional information and forms can be found on the Employee Benefits web site at <http://www.coj.net/benefits>. January 1, 2021, maximum allowed is \$2,700.00 per year.

DISCOVERY BENEFITS			
PH	(866) 451-3399	PO BOX 2926	
FAX	(866) 451-3245	FARGO, ND 58108-2926	www.discoverybenefits.com
EMAIL		customerservice@discoverybenefits.com	

FOR MORE DETAILED INFORMATION ON HEALTH, DENTAL, AND VISION PLANS, LIFE INSURANCE, AND FLEXIBLE SPENDING ACCOUNTS, PLEASE VISIT THE CITY'S EMPLOYEE BENEFITS WEB PAGE AT WWW.COJ.NET/BENEFITS. MAKE SURE TO SELECT THE 2021 BENEFIT INFORMATION." ADDITIONAL INFORMATION REGARDING ALL OF THE BENEFITS LISTED IN THIS SUMMARY IS LOCATED ON THIS WEB SITE. YOU MAY ALSO WISH TO VISIT THE ENROLLMENT SITE LOCATED IN THE TRAINING ROOM ON THE MEZZANINE FLOOR OF CITY HALL, OR CONTACT EMPLOYEE BENEFITS DIRECTLY AT (904) 255-5555.

IV. RETIREMENT

A. Retirement Benefits Summary

(Page 1 of 3)

FLORIDA RETIREMENT SYSTEM, JACKSONVILLE RETIREMENT SYSTEM, & DEFERRED COMPENSATION (457 ACCOUNT)

The following information highlights benefits relating to retirement options for Elected Officials, and Appointed Officials and Employees. Detailed information regarding each benefit can be found on the employees' web site known as the *Employee Portal*. Additional documents have also been included in this manual.

FLORIDA RETIREMENT SYSTEM (Elected Officials Only)

Initially, Elected Officials are required to participate in the Florida Retirement System (FRS). New members are defaulted to the *Investment Plan* upon enrollment, but may request to enroll in the *Pension Plan* at the time of enrollment. A Council Member does have the option to withdraw from FRS entirely, providing he/she: 1) enrolls in a local retirement plan or Social Security only, and 2) does so in writing to FRS within six months of the date they assume office.

Contribution

The City currently contributes 48.70% to FRS for City Council Members, as well as a 6.2% employer contribution to Social Security and 1.45% contribution for Medicare. Council Members contribute 3% of their salary to FRS plan, 6.2% to Social Security, and 1.45% to Medicare each pay period.

Benefits

The Florida Retirement System offers two retirement plans – a *Pension Plan* and an *Investment Plan*.

The **Pension Plan** is a defined benefits plan. The retirement benefits of the plan are determined by the employee's years of service, employment class, and salary. Elected Officials are vested after 8 years in office and earn a retirement benefit based on an accrual rate of 3% per year of service. See website for more information: <https://www.myfrs.com>

The **Investment Plan** is a defined contribution plan. The amount credited to the employee's retirement account (made from the total contribution made by the employer and the employee to FRS) is 11.34%. The employee invests in a diversified set of funds. Upon completion of one year of service, the employee owns all contributions and earnings in their account. See website for more information: <https://www.myfrs.com>

JACKSONVILLE RETIREMENT SYSTEM (Option for all Officials and Employees; Membership for Elected Officials is only permitted if FRS Membership has been withdrawn in writing to FRS within the first 6 months of office)

The Jacksonville Retirement System offers two plan options: a *Defined Benefit Plan* (which is now closed to new members effective 10/1/2017) and a *Defined Contribution Plan*. Neither the City nor the employees who are members of the Jacksonville Retirement System contributes to or participates in Social Security. Appointed employees who do not wish to participate in the Jacksonville Retirement System may opt out and will contribute to and be covered by Social Security only.

A. Retirement Benefits Summary

(Page 2 of 3)

Defined Benefit Plan

The *Defined Benefit Plan* was closed to new members effective 10/1/2017. Employees contribute 10% of their salary to the *Defined Benefit Plan* (9.7% for pension contribution and .3% for the disability program) in lieu of participation in Social Security. The City currently contributes a fixed dollar amount determined during the budget process each fiscal year to fund the plan.

The *Defined Benefit Plan* offers retirement benefits that are calculated based on the employee's highest consecutive 3 years of salary within their last 10 years of service, total years of service as a pension member, and age. The employee pays a fixed contribution each pay period, and the vesting period is 5 years of service. See *Retirement Calculation Table*.

Jacksonville Retirement System Defined Benefit Plan
Retirement Calculation Table

YEARS OF SERVICE	AGE	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65*
20		35.00%	38.00%	41.00%	44.00%	47.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
21		36.75%	39.90%	43.05%	46.20%	49.35%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%	52.50%
22		38.50%	41.80%	45.10%	48.40%	51.70%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%	55.00%
23		40.25%	43.70%	47.15%	50.60%	54.05%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%	57.50%
24		42.00%	45.60%	49.20%	52.80%	56.40%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%
25		50.00%	50.00%	51.25%	55.00%	58.75%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%	62.50%
26		52.00%	52.00%	53.30%	57.20%	61.10%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%
27		54.00%	54.00%	55.30%	59.40%	63.45%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%	67.50%
28		56.00%	56.00%	57.40%	61.60%	65.80%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%
29		58.00%	58.00%	59.45%	63.80%	68.15%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%	72.50%
30		75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
31		77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%	77.50%
32		80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%

* At 30 years of service, the employee can retire at any age with 75%

Defined Contribution Plan

Employees contribute 8% of their salary to the *Defined Contribution Plan* (7.7% for pension contribution and .3% for the disability program) in lieu of participation in Social Security. The City currently contributes a 12% contribution, as well as a 1.45% contribution to Medicare (for employees hired after April 1986).

The *Defined Contribution Plan* is an investment plan. The employee and the employer both make contributions to the retirement account, but the employee determines how the funds are invested (and withdrawn upon retirement). The value of the employee's portion of the retirement account is determined by a vesting schedule:

A. Retirement Benefits Summary

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Jacksonville Retirement System Defined Contribution Plan *Vesting Schedule*

Vested	Length of Service
25%	2 Years
50%	3 Years
75%	4 Years
100%	5 Years

See website for more information: <http://inside.coj.net/af/ret/default.aspx>.

DEFERRED COMPENSATION (457 ACCOUNT)

In addition to an employer-sponsored retirement plan, employees are provided the opportunity to contribute pre-tax funds via payroll deduction to a separate retirement account (457 Account) of their own. Currently, the City has one provider, *Empower*, for this tax-deferred savings plan. See website from the City Portal: <http://www.coj.net/departments/employee-services/employee-information/employee-information.aspx> and select *Empower Retirement Plans*.

V. ALLOWANCE, EQUIPMENT, & TRAVEL

A. Communications Allowance Policy

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OFFICE OF THE CITY COUNCIL

COMMUNICATIONS ALLOWANCE POLICY

Section 10.105(c) Jacksonville Ordinance Code

Effective August 12, 2014, the City Council approved Ordinance 2014-410-E (attached) to revise the mobile or converged communications device policy which provides fixed allowances for City Council Members upon request. In addition, effective March 17, 2016, the 12-month period for allowances was changed from *Council Year* to *Fiscal Year* to align payments to participants with the City Council budget. This policy provides a uniform communications allowance to be paid monthly to participating Council Members.

AMOUNT AND TERMS OF PAYMENT

Council Members and authorized members of staff who maintain cellular telephone service may receive a monthly allowance for a calling plan, texting, and/or data plan, not to exceed \$100.00 per month. This allowance excludes expenses for taxes, fees, equipment, and/or secondary lines.

Allowances will be paid the first payday of each month for the previous month. (EXAMPLE: The allowance for service(s) for the month of October will be paid the first payday in November.) In addition, allowances will only be paid for each full month of service. If a Council Member or staff member terminates employment prior to the end of a month, no Communications Allowance will be paid for that month. (EXAMPLE: Termination of employment on June 16th would result in no Communications Allowance paid for the month of June.)

REQUEST DEADLINE & PAYMENT SCHEDULE

The "Annual Request" period coincides with the Fiscal Year. Therefore, annual requests are due by September 30th and expire on September 30th of the following year. Although these requests are submitted annually, 30 days before the onset of the Fiscal Year, eligible participants may request the allowance at any time during the year. However, funding must be available and off-schedule requests must be received no later than the 1st day of the month for which the allowance is being requested and all requests expire September 30th, regardless of the date the request originated. Nothing in this policy authorizes retroactive payment for allowances that are not requested and approved prior to established deadlines. EXAMPLE: If an eligible participant requests an allowance beginning with the month of October, the request form is due no later than September 30th and expires September 30th of the following year. The first allowance will be paid the first payday in November.

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A. Communications Allowance Policy (Page 2 of 3)

Office of City Council
Communications Allowance Policy
Page 2

Upon receipt and approval of the *Communications Allowance Request* form, a communications allowance will continue to be paid the first payday of each month for service(s) for the previous month (ending September 30th of each year) unless one of the following occurs:

- a. The participant requests to discontinue receiving the allowance.
- b. The participant notifies the Director/Council Secretary that a service will be terminated.

It is the participant's responsibility to notify the Director/Council Secretary immediately if the telephone number and/or rate plan is changed or the service is terminated. It is also the participant's responsibility to submit a new request form including required documentation prior to the end of each Fiscal Year in order for the allowance to continue.

ALLOWANCE REQUEST FORM

The *Communications Allowance Request* form (attached) must be completed, signed, and submitted in accordance with this policy prior to the payment of any allowance. By signing this form, participants certify and acknowledge the following information:

- a. Receipt of this policy.
- b. Each service is currently active.
- c. The deadlines for submitting request forms.
- d. The notification requirement to the Director/Council Secretary immediately upon change of the telephone number, rate plan, or termination of service.
- e. The City's right to verify service(s) at any time.

In order to receive the allowance(s), an eligible participant must complete and sign the *Communications Allowance Request* form and submit it to the Director/Council Secretary no later than September 30th of each year (Fiscal Year: October 1 – September 30). A copy of the participant's current statement for cellular service that includes the service provider's name, type(s) of service, rate plan(s), participant's name, cellular telephone number, and billing date must be attached to the request form.

CHANGE OR TERMINATION OF SERVICE FORM

A participant receiving the communications allowance must notify the Director/Council Secretary immediately upon any change or termination of the service for which the allowance is

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A. Communications Allowance Policy (Page 3 of 3)

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Communications Allowance Policy
Page 3

being received. The *Communications Allowance Change of Service* form (attached) must be completed, signed, and submitted to the Director/Council Secretary immediately to ensure the service(s) can be verified and that no allowances are paid to the participant for terminated/cancelled service(s). If the service was changed, a copy of the participant's cover page of their first statement reflecting the change(s) must be submitted immediately upon receipt. The service provider's name, type(s) of service, rate plan(s), participant's name, cellular telephone number, and billing date must be included on the statement.

VERIFICATION

The City reserves the right to verify service(s) at any time to ensure allowances are not overpaid or paid for terminated/cancelled service(s). In order to do so, it is required that participants make the Director/Council Secretary immediately aware of any changes to service(s) that would prevent this verification, i.e. changing the telephone number, cancelling/terminating service, changing providers, etc.

Revised 10/1/2018
Revised 8/29/2016
Revised 3/17/2016
Revised 8/14/2014
Revised 6/29/2011
Approved 8/16/2005

EXHIBIT 4 – Communications Allowance Request Form



OFFICE OF THE CITY COUNCIL

COMMUNICATIONS ALLOWANCE REQUEST

Name: _____ Cellular Telephone #: _____
Print Name

Department #: _____ Employee ID #: _____

Mark Selection(s)

_____ I request a monthly communications allowance* in the amount of
\$_____ (not to exceed \$100) for the Fiscal Year ____/____ in accordance
with Chapter 10, *Ordinance Code* for mobile and/or converged data device
telephone service.

I have been given a copy of the City Council Communications Allowance Policy. I certify that each service selected above is currently active. I understand that this request will expire on September 30th and that a new request form must be submitted before September 30th to continue receiving the allowance(s). I will notify the Director/Council Secretary in writing immediately upon changing the telephone number, rate plan, or termination of this service. By my acceptance of the allowance(s), the City reserves the right to verify service(s) at any time.

Signature

Date

Approved by Director/Council Secretary

Date

* Monthly Allowances are paid the first payday of each month for the previous month.

EXHIBIT 5 – Communications Allowance Change Form



OFFICE OF THE CITY COUNCIL

COMMUNICATIONS ALLOWANCE CHANGE OR TERMINATION OF SERVICE

Name: _____
Print Name

Cellular Telephone #: _____

Department #: _____

Employee ID #: _____

Mark Selection(s)

_____ The service(s) for which I receive a communications allowance will change effective _____ in the following manner:

_____ The service(s) for which I receive a communications allowance will be terminated effective _____.

I hereby notify the Director/Council Secretary of change(s) or termination of service(s) for which I receive a communications allowance. I certify that the change(s) or termination occurred on the effective date noted above.

Signature

Date

Approved by Director/Council Secretary

Date

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B. Equipment Provided & Annual Inspection Procedure and Requirements

EQUIPMENT PROVIDED

In addition to standard office supplies, each Council Member will be issued the following equipment:

- (a) Computer for City Council Office
- (b) Printer for City Council Office

Council Members are responsible for all equipment and supplies issued to them. Routine inspections are conducted throughout the year to ensure that all City-issued property is working and accounted for. If any City-issued equipment requires service, a request should be made to Steve Cassada or Louie Marino, Information Systems & AV Managers. No Council Members or staff members are permitted to make repairs or to contract services for repairs to City-issued equipment. *Note: No City-issued equipment shall be removed or replaced without prior notification to the City Council Property Officer, Nancy Carlos, Administrative Assistant II.

ANNUAL INVENTORY CERTIFICATION

Each year, normally during the month of July, the Ordinance Code requires the City Accounting Division to generate a report for certification that includes all City-acquired equipment, furniture and other property items. It is the responsibility of each department to locate the items listed on the annual report, prior to the imposed deadline. The Administrative Assistant II for the Office of City Council performs this task for annual and routine certification. It is important that any City-issued equipment can be produced immediately upon request.

SURPLUS OR TRANSFER OF PROPERTY ITEMS

When property items, whether tagged or untagged, are no longer needed, they are either transferred to another City agency or transported to the surplus yard for auction. A Transfer or Disposal of Personal Property or Surplus Material form must be completed, signed by the Administrative Assistant II and Council Director. Neither Elected Officials nor employees are allowed to purchase City-acquired items prior to surplus. However, the City surplus yard does hold noticed auctions at which City items can be purchased.

EXHIBIT 6 – Receipt/Acknowledgement for Equipment Form

Equipment Verification Form

Doe, John

The following CHECKED items are in my possession as of the date signed below:

<i>Item</i>	<i>ID Number</i>	<i>Description/Comments</i>
☐ PRINTER	999995	HP Ofc Jet 1150C
☐ COMPUTER	999996	VA# 000
☐ COMPUTER	999997	VA# D999 - Laptop
☐ MONITOR	999998	Flat Screen
☐ WORKSTATION	999999	Desk

Signature

Date

C. Travel Procedures & Requirements (Page 1 of 6)

CITY COUNCIL TRAVEL PROCEDURES AND REQUIREMENTS Rev. March 1, 2020

TRAVEL PROCEDURES

In order to ensure compliance with local, state, and federal laws, the following policy outlines the requirements for all City Council related travel.

Travel Funds

In accordance with Chapter 10.6, Part 7, *Jacksonville Ordinance Code*, the *City of Jacksonville Travel Regulations*, and Council Rules 1.304 and 1.305, Council Members may request approval from the Council President to attend events (at the City's expense) that are held out of the city/county, for City Council business, providing that: 1) funding is available, and 2) they obtain prior approval by the Council President. Council Members may not exceed \$3,000 per fiscal year for **"Council Related"** travel expenses. (Travel for **"Special Assignment"** assigned by the Council President and **"Designated Member"** for the designated member(s) of FAC, FLC, NAC, and/or NLC are excluded from the \$3,000 fiscal year maximum.) If funding is unavailable, the traveler may still be approved to travel by using their personal funds to pay for the portion of the expenses that exceed the amount remaining of their fiscal year allocation. Unused funds will not carry over to the following fiscal year and cannot be transferred or reassigned to another Council Member or employee.

In addition and in accordance with Council Rule 1.306, a Council Member who serves as a designated member (assigned by the Council President) of the Florida Association of Counties (FAC), Florida League of Cities (FLC), National Association of Counties (NAC), and/or National League of Cities (NLC) may be approved for funding from the **"Designated Member"** travel account (a separate account within the City Council budget) to attend related meetings and events. Travel expenses for this type of travel are excluded from the Council Member's \$3,000 fiscal year allocation.

Request to Travel (Authorization to Travel Form)

Prior to the departure date for travel, an *"Authorization for Council Member Travel"* form must be completed by the Traveler (Council Member). This form must be completed, signed, and submitted to the Executive Administrator who will review the request, and confirm that funds are available to the Council Member for travel. Documentation such as an invitation, brochure, itinerary, or other record that provides the details and reason for travel must be attached. The Executive Administrator submits the request form and supporting documentation to the Council President for consideration. The Council President returns the original form to the Executive Administrator, and the Council Member and ECA are notified of the decision via email.

C. Travel Procedures and Requirements

(Page 2 of 6)

Travel Arrangements

It is the responsibility of the Executive Council Assistant (ECA) to coordinate all travel arrangements as requested by their Council Member. This includes hotel reservations, flight reservations, registrations for events, etc. (Lodging reservations require the Traveler's personal credit card to hold the reservation.)

If any travel expenses require advance payment (i.e. conference registration fees, flight reservations, etc.), the Council Member may use their personal credit card to pay for these expenses, providing that the travel request has been approved. All travel expense reimbursements will be paid when the trip is concluded. (Cash advance payments for meals will be considered for International Travel only.)

If the Council Member does not have a personal credit card available to make advance payments, they can contact the Executive Administrator to request assistance for another method of payment. However, the Council Member's personal credit card is still required for hotel reservations.

If the Executive Administrator secures another payment method in place of the Traveler's personal credit card, documentation is required at the time of payment. For air transportation, a copy of the flight itinerary and itemized receipt are required. For registration fees, the completed registration form and receipt of payment are required. All documentation and receipts must be emailed to the Executive Administrator at the time of payment.

Requests for Reimbursement

ECAs are responsible for compiling all original receipts, agendas, and itineraries, as well as their Council Member's Trip Report. Once all of the documentation has been collected, the ECA will attach it to a completed *Travel Concluded* form and submit it to the Executive Administrator (within 30 days of the travel period end date).

The Executive Administrator reviews all documentation related to travel and enters the reimbursement request data and supporting documentation of expenses to the City's 1Cloud System for consideration and processing. Once submitted, the Expense Report is routed in 1Cloud to the Traveler (Council Member) for review and approval. If approved, the record is then automatically routed to the Council President for review and consideration of expenses.

Trip Report

Once the Council Member has returned, a "*Trip Report*" (in the form of a memorandum from the Traveler/Council Member to the Council President) summarizing the events of the trip and noting benefit(s) gained for the City and/or City Council must be included with the supporting documentation prior to reimbursement. Council Members are encouraged to provide a copy of the report to all Council Members for information purposes.

C. Travel Procedures and Requirements

(Page 3 of 6)

Travel Expenses

There are strict laws governing travel expenses which can be found in Chapter 106 of the *Jacksonville Ordinance Code*, as well as in *Council Rules 1.304 – 1.306*. It is important to remember that the ordinance code requires the Traveler to use the most economical (least expensive) mode of transportation. Since most City Council travel destinations are located in Florida, driving a personal vehicle is normally the least expensive. However, if the traveler is able to reserve a flight for less than the cost of mileage reimbursement, air transportation may be approved. Likewise, a traveler may request to rent of vehicle rather than drive their own personal vehicle. If the traveler is able to rent a vehicle (including fuel costs) for less than the cost of mileage reimbursement, they may be approved to do so. If the traveler chooses to use transportation that exceeds the cost of mileage reimbursement, they are responsible for paying the difference from personal funds.

The following summarizes expenses for transportation, lodging, registration, and meals:

- a) **Air Transportation:** Once the travel request has been approved and air transportation has been authorized by the Council President, the ECA is responsible for making flight reservations. If the Council Member requests to charge the flight expenses to the City Council P-Card, the ECA will coordinate with the Executive Administrator to facilitate payment for the flight. Any flights reserved and paid for by the Traveler, excluding any upgrades, may be reimbursed upon the Traveler's return, providing that the Council President approves. If a Traveler chooses air transportation that exceeds the cost of mileage reimbursement, the Traveler may be reimbursed the lesser amount for transportation costs.
- b) **Personal Vehicle:** When driving a personal vehicle to a destination (outside of Duval County), mileage may be reimbursed upon the Traveler's return. The mileage amount is based on the current IRS mileage reimbursement allowance and includes fuel. The current mileage allowance is \$0.575 per mile. The number of miles to and from a destination is based on the City's approved mileage chart, which may differ from the actual miles driven. However, actual odometer readings are still required.
- c) **Rental Vehicle:** The Traveler may be approved to rent a vehicle, providing that the rental fees and fuel costs do not exceed the amount the Traveler would have been reimbursed for mileage had they driven a personal vehicle. If the Traveler chooses to rent a vehicle that exceeds the current mileage reimbursement amount, the Traveler may be reimbursed the lesser amount.
- c) **Lodging:** Lodging arrangements are normally selected by the organization holding the event. Extended stays for personal reasons and/or charges for additional guests will not be reimbursed to the Traveler. Additional charges, including but not limited to telephone calls, mini-bar usage, movie rentals, salon services, etc. are not reimbursable expenses. Baggage tips are reimbursed at a maximum rate of \$2 at check-in and \$2 at check-out.

C. Travel Procedures and Requirements

(Page 4 of 6)

- d) **Meals**: Meals during the trip are determined by the time of day the traveler leaves the City of Jacksonville and the time of day they return. Currently, breakfast is reimbursed at a rate of \$10, lunch at a rate of \$14, and dinner at a rate of \$26. No receipts are required for meal reimbursement. Any meals provided at no additional cost by the host event, hotel, or other party cannot be claimed for reimbursement, even if the Traveler did not participate in the meal.
NOTE: A continental breakfast is not considered "breakfast." A "Reception" that only serves appetizers/finger food does not count as "dinner." Reimbursement would be authorized for these meals.
- e) **Other Expenses**: Parking, taxi, tolls, and other expenses required of the traveler to attend the event will be reimbursed if: a) the expense was required to attend the event, and (b) the Traveler provides an original receipt showing the date, amount, and type of the expense.

Reimbursement

Travel reimbursements are paid via direct deposit to the traveler's bank account.

C. Travel Procedures and Requirements

(Page 5 of 6)

TRAVEL PROCEDURES STEP BY STEP

1. Does the Council Member want to use City funds to Travel?

YES.

- a) Complete the *"Authorization for Council Member Travel"* form. Estimate the total cost of the trip and complete each line. Identify the funding source. Attach detailed information (invitation, brochure, itinerary, etc.) regarding the trip and submit to Laura Dyer, Executive Administrator. After travel is approved, continue to Step 2.

2. Is the Council Member requesting advance payments for flight or registration fees?

NO.

- a) No action needed.

YES.

- a) Council Members may pay the advancements with a personal credit card, providing that the travel request has been approved. All travel expense reimbursements will be paid when the trip is concluded. Original receipts are required for all reimbursements and the Council Member's name and last series of digits on their credit card number must appear on the receipt. No reimbursements are granted until the Traveler returns with confirmation of attendance.
- b) Arrangements for advance payments must be coordinated with the Executive Council Administrator. If an advance payment is made by the Executive Administrator, reservation confirmation and receipt of payment must be submitted to the Executive Administrator at the time payment is made. (Example - Registration fees paid in advance require confirmation of registration and receipt when paid.)

3. When the Council Member returns, all original receipts for advance payments, as well as the Trip Report and *Travel Concluded* form must be submitted. Does the Council Member wish to be reimbursed any additional expenses?

NO.

- a) Complete the *Travel Concluded* form and attach the Trip Report. Submit all documentation to the Executive Administrator and confirm that no other receipts or documentation is required to close out the trip.

C. Travel Procedures and Requirements

(Page 6 of 6)

YES.

- a) Submit original receipts for expenses (excluding meals) paid by the Council Member and the Trip Report to the Executive Administrator. **All receipts less than 8.5" x 11" must be taped on all (4) sides to a blank 8.5" x 11" sheet of paper. No bits of paper are accepted due to the volume of copying and scanning required of City Council staff and Central Accounting.**

Please refrain from stapling any portion of the travel documentation or receipts; a paper clip is preferred.

- b) If mileage reimbursement is requested, provide the odometer readings.
- c) Once submitted into 1Cloud by the Executive Administrator, the request for reimbursement will route to the Council Member's In Box for approval. Council Members are encouraged to review the expenses and approve if the data is correct. Once approved by the Council Member, the reimbursement request is routed by 1Cloud to the Council President for final approval.

For City Travel Procedures and Regulations, see more detailed information in the Jacksonville Ordinance Code and the City's Travel Instructions (included in this section).

Please see the Executive Administrator for assistance.

EXHIBIT 7 – Travel Authorization Form



OFFICE OF THE CITY COUNCIL AUTHORIZATION FOR COUNCIL MEMBER TRAVEL

DATE: _____

TO: _____, Council President

FROM: _____, Council Member, <insert District or AL Group>

I request authorization and funding for travel expenses to attend the following:

DESTINATION (City, State):

DATE(S) OF TRAVEL:

PURPOSE OF TRAVEL:

BENEFIT TO CITY COUNCIL:

APPROXIMATE TOTAL COST (include lodging, transportation, registration, mileage, & meals):
\$ 00

FUNDING SOURCE: ___ Council Member's Fiscal Year Allocation (\$3,000)
 ___ Designated Member for FAC, FLC, NAC, & NLC
 ___ Special Assignment (made by the Council President)

APPROVAL:

Funding Availability Verified by:

Date

_____, Council President

Date

SUITE 425, CITY HALL • 117 WEST DUVAL STREET • JACKSONVILLE, FLORIDA 32202-3418 • TELEPHONE (904) 630-1377

EXHIBIT 8 – Travel Concluded Form



OFFICE OF THE CITY COUNCIL

TRAVEL CONCLUDED FORM COUNCIL MEMBER

DATE: *<Insert Date>*

TO: *<Insert Name>*, Council President

FROM: *<Insert name>*, Council Member, *<Insert District or AL Group>*

Travel expenses and information:

DESTINATION (City, State): _____

DEPARTURE DATE & TIME: ____/____/____ ____:____ AM /PM

RETURN DATE & TIME: ____/____/____ ____:____ AM /PM

ODOMETER READING
(Only if Personal Vehicle Used)

Prior to Departure

Upon Return

Meal Type (Breakfast, Lunch, or Dinner)

Date

**MEALS PROVIDED
AT NO COST TO
TRAVELER:
(No Reimbursement)**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I certify that all information and receipts provided for expenses related to this travel event are correct.

<Insert Traveler's Name>

Date

Council Member, *<Insert District or AL Group>*

EXHIBIT 9 – Travel Expense Reporting

(Page 1 of 3)

TRAVEL EXPENSE REPORTS & REIMBURSEMENTS

(See Official Travel Rules, Regulations, Policies, & Procedures located in the Index Section)

TRAVEL REQUESTS & AUTHORIZATION

Council Members

Any Council Member who requests to travel at the Office of City Council's expense must obtain approval from the Council President prior to registering or departing for the event. The following procedures have been established to ensure compliance with all laws, rules, regulations, and policies relating to City travel:

1. An *Authorization for Council Member Travel* form must be completed and submitted to the Executive Administrator for review and confirmation of funding, prior to the Council President's approval. Documentation such as an invitation, brochure, itinerary, or other record that provides the details and reason for travel must be attached.
2. Standard travel requests made by Council Members are referred to as "**Council-Related**" travel and members are limited to a \$3,000 maximum per fiscal year (Section 106.701, *Jacksonville Ordinance Code*, and Council Rules 1.304 and 1.305), unless the Council President approves additional funding for a special assignment.

A Council Member who has been designated as a representative to the Florida Association of Counties (FAC), Florida League of Cities (FLC), National Association of Counties (NAC), and/or National League of Cities (NLC) may be approved for "**Designated Member**" travel (Council Rule 1.306). Expenses for Designated Member travel are excluded from the Council Member's \$3,000 fiscal year allocation.

A Council Member may be requested by the Council President to perform a specific assignment that requires travel. This type of travel is referred to as "**Special Assignment**" travel, and expenses are excluded from the Council Member's \$3,000 fiscal year allocation.

3. The Executive Administrator reviews the travel request and confirms funding availability. The form and supporting documentation are then routed to the Council President for consideration.
4. If approved by the Council President, the original request form is returned to the Executive Administrator. The Executive Administrator will notify the Council Member and their Executive Council Assistant (ECA) of the decision via email. It is the ECA's responsibility to make all travel arrangements and to compile all receipts and other required documentation.
5. Reservations for lodging must be reserved with the Traveler's personal credit card. Upon check-in, the Traveler will be required to produce the credit card with their name on it.

EXHIBIT 9 – Travel Expense Reporting

(Page 2 of 3)

6. If any travel expenses require advance payment (i.e. conference registration fees, flight reservations, etc.), the Council Member may use their personal credit card to pay for these expenses, providing that the travel request has been approved. All travel expense reimbursements will be paid when the trip is concluded. (Cash advance payments for meals will be considered for International Travel only.)

If the Council Member does not have a personal credit card available to make advance payments, they can contact the Executive Administrator to request assistance for another method of payment (limited funds available). However, the Council Member's personal credit card is still required for hotel reservations.

If the Executive Administrator secures another payment method in place of the Traveler's personal credit card, documentation is required at the time of payment. For air transportation, a copy of the flight itinerary and itemized receipt are required. For registration fees, the completed registration form and receipt of payment are required. All documentation and receipts alternate payment must be emailed to the Executive Administrator at the time of payment.

7. ECAs are responsible for compiling all original receipts, agendas, and itineraries, as well as their Council Member's Trip Report (summary of events and accomplishments related to the trip). Once all of the documentation has been collected, the ECA will attach it to a completed *Travel Concluded* form and submit it to the Executive Administrator (within 30 days of the travel period end date).
8. The Executive Administrator reviews all documentation related to travel and enters the reimbursement request data and supporting documentation of expenses to the City's 1Cloud System for consideration and processing. Once submitted, the Expense Report is routed to the Traveler (Council Member) for review and approval. If approved, the record is then automatically routed to the Council President for review and consideration of expenses.
9. *Council Member Travel Checklists* are available (for use before and after the travel period) to ensure that all procedures are followed and all documentation is received.

Staff Members

Staff Members who request or are required to travel to attend a conference or other event related to the performance of their duties will follow the same procedures as stated above, with the following exceptions:

1. Staff members will submit an *Authorization for Staff Member Travel* form to the Executive Administrator.

EXHIBIT 9 – Travel Expense Reporting

(Page 3 of 3)

2. The Director/Council Secretary reviews and approves travel for all staff members under her authority.
3. The Traveler (staff member) is responsible for making their travel arrangements, with guidance from the Director/Council Secretary.
4. The Traveler (staff member) is responsible for compiling and attaching all original receipts for travel expenses to a completed *Travel Concluded* form and submitting it to the Executive Administrator.
5. *Staff Member Checklists* are available (for use before and after the travel period) to ensure that all procedures are followed and all documentation is received

PAYMENT FOR TRAVEL REIMBURSEMENT

Reimbursements for travel expenses are paid via direct deposit. City Treasury deposits the funds into the Traveler's checking or savings account that has been designated in 1Cloud for reimbursement of expenses. (The Executive Administrator will assist with the initial designation and direct- deposit set-up in 1Cloud.)

EXHIBIT 10 – Out of City Mileage
(Page 1 of 4)

OUT OF CITY MILEAGE	ONE WAY TRIP	ROUND TRIP
JACKSONVILLE TO:	FLORIDA CITIES	
Altamonte Springs	125	250
Amelia Island	44	88
Apalachicola	231	462
Arcadia	239	478
Barton	200	400
Bartow	189	378
Belle Glade	286	572
Blountstown	212	424
Boca Raton	303	606
Bonifay	254	508
Boynton Beach	290	580
Bradenton	227	454
Bristol	207	414
Bronson	94	188
Brooksville	147	294
Bunnell	68	136
Bushnell	133	266
Callahan	25	50
Cape Canaveral	148	296
Captiva Island	359	718
Chattahoochee	203	406
Chipley	246	492
Clearwater	197	394
Cocoa	153	306
Coral Gables	348	696
Crawfordville	178	356
Crescent City	78	156
Crestview	309	618
Cross City	113	226
Crystal River	143	286
Dade City	155	310
Daytona Beach	89	178
Deerfield Beach	315	630
Defuniak Springs	281	562
Deland	100	200
Delray Beach	295	590
Destin	331	662
Disney World	166	332
Fernandina Beach	33	66
	83	

EXHIBIT 10 – Out of City Mileage
(Page 2 of 4)

Flagler Beach	72	144
Fort Lauderdale	320	640
Fort Myers	286	572
Fort Pierce	221	442
Fort Walton Beach	314	628
Gainesville	69	138
Green Cove Springs	27	54
Greenelefe	183	366
Haines City	180	360
Hialeah	343	686
Highlands	394	788
Hilliard	35	70
Hollywood	327	654
Homestead	371	742
Inverness	126	252
Jacksonville Beach	18	36
Jasper	89	178
Jupiter	250	500
Key Biscayne	374	748
Key West	498	996
Keystone Heights	49	98
Kissimmee	152	304
Labelle	274	548
Lake City	60	120
Lake Butler	53	106
Lake Buena Vista	166	332
Lakeland	180	360
Lake Worth	284	568
Largo	225	450
Leesburg	123	246
Live Oak	83	166
Longwood	140	280
Macclenny	29	58
Madison	111	222
Maitland	145	290
Marco Island	370	740
Marianna	227	454
Marineland	58	116
Mayo	100	200
Melbourne	174	348
Merritt Island	160	320
Miami	345	690
Miami Beach	342	684
Milton	339	678
Miramar	327	654
Monticello	141	282
Moore Haven	276	552
Mount Dora	144	288

EXHIBIT 10 – Out of City Mileage
(Page 3 of 4)

Naples	322	644
New Smyrna Beach	104	208
North Miami Beach	333	666
South Miami Beach	335	670
Ocala	95	190
Okeechobee	240	480
Orange Park	14	28
Orlando	147	294
Palm Beach Gardens	280	560
Palm Coast	60	120
Panama City	261	522
Pensacola	354	708
Perry	126	252
Plant City	180	360
Pompano Beach	311	622
Ponte Vedra	15	31
Port St. Joe	253	506
Punta Gorda	264	528
Quincy	185	370
Raiford	45	90
Sanford	118	236
Sarasota	240	480
Sebring	219	438
St Augustine	39	78
St Johns County	33	66
St Petersburg	210	420
Starke	43	86
Stuart	239	478
Tallahassee	163	326
Tampa	190	380
Tavares	119	238
Temple Terrace	196	392
Titusville	134	268
Trenton	98	196
Vero Beach	207	414
Wauchula Springs	178	356
Wauchula	215	430
West Palm Beach	277	554
Winter Haven	180	360
Winter Park	135	270
Yulee	25	50
Zephyrhills	185	370

EXHIBIT 10 – Out of City Mileage
(Page 4 of 4)

JACKSONVILLE TO:

GEORGIA CITIES

Atlanta	362	724
Athens	383	766
Brunswick	72	144
Crystal River	127	254
Macon	265	530
Marietta	368	736
Savannah	154	308
St Simons Island	76	152
Kings Bay	70	140

JACKSONVILLE TO:

OTHER

Alexandria Virginia	699	1398
Astor Park	160	320
Avon Park	215	430
Bal Harbour	351	702
Charleston SC	244	488
High Point NC	479	958
New Orleans LA	549	1098
North Charleston SC	220	440
O'Leno State Park	80	160
Raleigh NC	467	934
Treasure Island	220	440
Virginia Beach	641	1282
Washington DC	708	1416

DUVAL COUNTY)
STATE OF FLORIDA) ss.

Comes now _____ and makes this affidavit as follows:

- | | | |
|-------|------------------------------|----------|
| _____ | transportation expenses | \$ _____ |
| _____ | lodging expenses | \$ _____ |
| _____ | meals | \$ _____ |
| _____ | taxi or ferry fares | \$ _____ |
| _____ | bridge, road tunnel tolls | \$ _____ |
| _____ | communication expense | \$ _____ |
| _____ | storage fees | \$ _____ |
| _____ | parking fees | \$ _____ |
| _____ | conference registration fees | \$ _____ |

Name

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EXHIBIT 12 – Travel Advance & Expense Report Checklists
(Page 1 of 3)

**TRAVEL AUTHORIZATION CHECKLIST
REQUIRED PRIOR TO DEPARTURE DATE**

Please ensure the following information has been submitted to the Executive Administrator on the *Authorization for Council Member Travel* form.

- ☐ DATE: Date of Request
- ☐ TO: Council President's Name
- ☐ FROM: Traveler's Name
- ☐ DESTINATION: City, State
- ☐ DATE(S) OF TRAVEL: Departure Date – Return Date
- ☐ PURPOSE OF TRAVEL: Name of Official Event or Subject Matter
- ☐ BENEFIT TO CITY COUNCIL: Justification for Traveling at the City's Expense
- ☐ COST ESTIMATE: Cost Estimate of Total Expenses, including Advance Payments
- ☐ FUNDING SOURCE:
 - ___ Council Member's Fiscal Year Allocation (\$3,000 maximum)
 - ___ Designated Member of FAC, FLC, NAC, and/or NLC
 - ___ Special Assignment (request made by the Council President to the Council Member)
- ☐ VERIFICATION OF FUNDING: Authorization for Travel Form submitted to Executive Administrator to confirm funding
- ☐ APPROVAL: Executive Administrator obtains Council President's approval/denial and provides copy of travel documents to the Traveler.

Please ensure that the following information is attached to the *Authorization for Council Member Travel* form.

- ☐ The invitation, announcement, brochure, or other information regarding the trip (include preliminary agenda/itinerary if provided)

EXHIBIT 12 – Travel Advance & Expense Report Checklists
(Page 2 of 3)

**TRAVEL REQUEST FOR ADVANCE PAYMENT
REQUIRED PRIOR TO DEPARTURE DATE**

Once approved for travel, the following information is required to request any advance payments using the City Council P-Card. (Must be coordinated with the Executive Administrator prior to the departure date.)

- ☐ REGISTRATION: Name, Address, & Telephone Number for Host Organization;
Registration Amount; Completed Registration Form
- ☐ AIR TRANSPORTATION: Name & Telephone Number for Carrier; Quote with Flight Information
to be Reserved and Paid

Documentation Required after Advance Payment is made and prior to departure date.

- ☐ REGISTRATION: Copy of Registration Payment Receipt
- ☐ AIR TRANSPORTATION: Copy of Flight Reservation with Itinerary, Traveler's Name, and
Payment Receipt

EXHIBIT 12 – Travel Advance & Expense Report Checklists
(Page 3 of 3)

COUNCIL MEMBER – TRAVEL EXPENSE REPORT CHECKLIST

Please submit within 30 days of the Traveler's return to the Executive Administrator.

- ☐ Travel Concluded Form*
- ☐ Airline Boarding Passes (include itinerary and receipt for ticket if paid by Traveler)
- ☐ Hotel Receipt Showing a \$0.00 Balance Due (Express checkout does not produce the required receipt)
- ☐ Copy of Itinerary/Agenda (Required to Confirm Attendance and to Determine Meal Reimbursement)
- ☐ Original Parking Receipts
- ☐ Original Taxi/Toll Receipts
- ☐ Rental Car and Gasoline Receipts showing a \$0.00 balance due (if applicable)
- ☐ Any other documentation regarding the trip (Must submit any refund checks owed to the City prior to submitting request for final reimbursement.)

Organizing the Information.

- ☐ Tape any pages or receipts that are smaller in size than 8.5" x 11" to an 8.5" x 11" sheet of paper. Tape all four sides of the receipt to prevent shredding during the scanning and copying process.

Please ensure that the following information is completed on the *Travel Concluded form.**

- ☐ Date & Hour of Travel: Departure and return dates & times determine meal reimbursement
- ☐ Meals Per Diem: Breakfast (must depart Jax before 6 AM on first day of travel or arrive back to Jax after 8 AM on the last day of travel)

Lunch (must depart Jax before 12 PM on the first day of travel or arrive back to Jax after 2 PM on the last day of travel)

Dinner (must depart Jax before 6 PM on the first day of travel or arrive back to JAX after 8 PM on the last day of travel)
- ☐ Auto Mileage Actual Odometer Readings prior to and upon return from travel (Actual readings required, but reimbursement is paid based on the City's *Out of City Mileage Chart*)
- Trip Report attached Summary of information gained from the event in Memo form from the Traveler & addressed to the Council President

EXHIBIT 13 – Travel Regulations

(Page 1 of 12)

CONSOLIDATED GOVERNMENT TRAVEL REGULATIONS

PART 1. GENERAL PROVISIONS

1.01 Purpose; authority. This manual is issued by the Director of Administration and Finance to implement the provisions of Part 7, Chapter 106 Ordinance Code of the City of Jacksonville. These travel regulations are issued under the authority of Section 106.702 O. C., and are applicable to those offices, departments or agencies as listed in s. 106.103(h). The Department of Administration and Finance is responsible for the proper administration of Chapter 106 Part 7. This responsibility involves determining whether claims for travel expenses are in accordance with the law and these travel regulations, disallowing or recommending the disallowance of improper claims and seeking reimbursement of improperly claimed and paid travel expenses.

1.02 Reference applicable to amendments. Whenever a reference is made to these regulations or a portion thereof, the reference shall apply to and be construed to include all amendments, supplements and revisions as promulgated by the Director of Administration and Finance.

1.03 Scope. The travel regulations shall apply to all City and Independent Agencies using Part 7, Chapter 106.O.C. as authority to pay or reimburse for expenses of persons traveling on official business of an agency. Waivers to or modifications of these regulations are not permitted unless authorized by law or by the Director of Administration and Finance, as stipulated by published supplements to this document. No authority, authorization or permission may be assumed if it does not appear in the travel regulations.

1.04 Definitions. In the travel regulations:

(a) the terms agency, approving authority, common carrier, conference, traveler and household goods and personal effects have the meanings given to them by 106.701, O.C.

(b) a chartered vehicle is any vehicle for hire, including an aircraft, a vessel, a bus or any other conveyance hired to transport persons, with baggage, equipment and material, from the City to another destination, specifically for this purpose and not as a part of a scheduled route.

(c) Department means the Department of Administration and Finance of the City of Jacksonville.

(d) Director means the Director of Administration and Finance.

(e) O.C. means the Ordinance Code of the City of Jacksonville.

(f) overnight means that the traveler is actually or constructively in a travel status during the hours from 8:00 p.m. to 6:00 a.m..

(g) principal workplace means that public office, public building or public facility where the traveler performs most of his official duties or, where he reports to receive instructions and to be paid.

(h) 7-106 means Part 7, Chapter 106, Ordinance Code of the City of Jacksonville.

(i) vicinity mileage means mileage driven by a traveler at the travel destination in connection with official business, and mileage to and from the terminal of a common carrier.

(j) travel regulations include all of the text of this manual, and changes promulgated and issued as supplements to this manual.

EXHIBIT 13 – Travel Regulations

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1.05 Travel defined. Only those incidents that require a traveler to leave the City (Duval County) to conduct official business for the City or Independent Agency, are considered travel, or as detailed in 106.710.O.C. Official travel status encompasses the time from the departure from a traveler's home or principal workplace to his arrival back to his home or principal workplace, unless he conducts personal business unconnected with the authorized purpose of his trip. During the time of this unofficial business, the traveler is considered in non travel status not entitled to any of the provisions of Part 7, Chapter 106 of the Ordinance Code; provided, that a traveler will not be considered in a non travel status if, in the opinion of the approving authority, the unofficial business is conducted incidentally to the official business and separating the two periods would be impractical.

1.06 Forms. The form to be used in authorizing and documenting travel is illustrated in Part 6. This form may be locally produced by the using agencies according to current technology but, must be presented to the Department with proper authorization signatures. Electronic transmission, instead of a signed copy of this approved form, is currently not authorized.

1.07 Designation of travel coordinator. Each department or agency director shall name a person to coordinate the travel for the department. This person will be responsible for submitting the required information with authorized forms to the Department for processing. This person will be the contact between the traveler, travel vendors and the Department, and should be familiar with all rules and regulations regarding travel. This does not preclude the assignment of other persons to make the travel arrangements within an area of operations and provide the documentation to the department/agency coordinator.

Part 2. AUTHORIZATION TO

TRAVEL; TRAVEL ADVANCES

2.01 Approval for travel. No traveler may be reimbursed for travel expenses unless, prior to such travel, the approving authority has authorized and approved the travel. Authorization to travel shall be shown in the Approvals to Travel@ portion (Section I) of the Travel Form. The approving authority is as defined in 106.701(b), O.C.

2.02 Approving authorities to permit only lawful travel. Only Travel for a public purpose connected with the duties, responsibilities and mission of the approving authority shall be authorized. Other travel for personal reasons, or for a purpose not supported by the mission of an agency may not be approved for payment from public funds. This will not prevent an authority from authorizing travel for any lawful purpose at no cost to the consolidated government.

2.03 Joint approvals. Two or more approving authorities may authorize travel, when such travel is for a public purpose connected with the mission of each approving authority. The cooperating authorities will determine the method by which the traveler will be reimbursed. Never shall joint approval of travel be construed as authority for reimbursement of payment of travel expenses in any amount greater than that which could be claimed if the travel had been conducted for only one approving authority.

2.04 Travel advances.

(a) Authorized expenses. An approving authority may authorize an advance to cover the anticipated cost of the travel. The amount of the advance may include the quoted costs of:

(1) transportation by common carrier, payable to the common carrier,

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(2) lodging, at the single room rate, payable to the provider,

(3) registration fees payable to the sponsor of the conference, and

(4) meals, at the per diem rate, if travel is expected to last five full days or longer, payable to the authorized traveler, for the traveler and any person transported in the care and custody of the traveler in the performance of the traveler's official duties. The advance shall be *estimated* according to Part 3.

No other expenses shall be authorized or included in the advance. In extraordinary cases, the Director may authorize the traveler to use cash to pay for transportation and lodging expenses instead of checks payable to the providers. In no case will cash be provided for the purpose of paying registration.

A traveler who is provided with a cash advance shall be personally liable for the amount thereof.

(b) How authorized. Using the form illustrated in Part 6.08, an approving authority, will authorize the travel on Section I, and may prepare and submit to the Department a request for travel advance per Section II of the same form. The Department, for those agencies using the financial services of the Department, will audit the request for accuracy and may correct any errors before the checks are drawn. The checks will be returned to the approving authority after signature by the Treasurer. The approving authority accepts responsibility and accountability for the advances and, at this point, the traveler becomes responsible to the approving authority for the final accounting of the expenses of the travel. This accounting, by the traveler, shall be made within five (5) working days of the completion of the travel. The traveler shall return to the approving authority:

(1) the amount of the cash advance that was not expended on lawful travel expenses, and

(2) receipts, tickets and other documentary evidence of the amount that was expended, as required by Part 6, except that receipts for meals are not necessary.

The amount of cash returned plus the cash total of the documentary evidence shall equal the amount originally advanced. If such amounts do not equal, the traveler will provide an affidavit that clearly states the travel expense that was paid by the difference.

If advance checks were drawn to the providers of transportation and lodging, the traveler's copy of the transportation ticket and the original detailed paid receipt provided by the lodging establishment must be attached to and become part of the travel form. In the event that the travel is not performed, or the cost of those items for which advances were made is less than the advance, the traveler is responsible to the City or approving authority for the return of any funds due from the common carrier, conference sponsor or lodging establishment. When a non-refundable ticket is ordered and then is not used, it is the responsibility of the traveler to notify the travel coordinator of his department or agency. This person will call the travel agent to notify them of the unused ticket. The ticket will then be picked up by the travel agent for credit against a future trip by the same traveler. The new travel date must be within one year from date of issuance of the returned ticket. This is in compliance with air line policies. Failure to comply with this regulation does not release the authorizing agency from the liability for the requested ticket.

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PART 3. REIMBURSABLE

TRAVEL EXPENSES

3.01 Purpose of Part 3. The purpose of this part is to define which expenses incurred by a traveler will be considered reimbursable travel expenses, and to prescribe the methods by which the reimbursable amounts will be determined. It is the responsibility of the traveler to claim reimbursement only for the official travel, and the necessary expenses of that travel in the performance of official business.

3.02 Constructive point of origin. In the case of travel by:

(a) common carrier (excluding a rental automobile), travel will originate at the place where the traveler boards the conveyance, with mileage to and from such place as provided in Part 3.11.

(b) motor vehicle (including a rental automobile), travel will originate:

(1) in the case of a traveler who is an officer or employee, at City Hall, or, at the traveler=s home, whichever is the lesser actual mileage to the destination.

(2) For any other traveler, at the traveler=s home or place of business, or at the place the travel commenced, whichever is the lesser actual mileage to the destination.

3.03 Constructive travel time. Travel will be deemed to have commenced, the shorter of the time the traveler actually began travel, or the latest time reasonably possible to arrive at the destination at the time required to accomplish the purpose of the travel.

The same constructive travel time will be applied in the return of the traveler. The purpose of applying this constructive travel time regulation is to assure that the traveler spends the least possible time on official travel. If personal business is conducted during the travel, reimbursement for lodging and meals shall be based on and approved for only the constructive travel time as determined by this section, for the official travel.

3.04 Most direct routes of travel; official maps. Reimbursement for transportation expenses will be allowed only for the distance necessary, or the most direct route of travel to accomplish the official business of the traveler. The most current maps used by the State Department of Transportation will be the official reference for distances and mileage. In case of questioned distances and mileage, the official maps will be final and conclusive upon all approving authorities and travelers.

3.05 Mode of transportation, generally.

(a) Authorized modes. Travel on official business may be by a public motor vehicle, a common carrier, a chartered vehicle or a private motor vehicle.

Approving authorities shall designate the mode of transportation in advance of the travel. A public motor vehicle is preferred, followed by the other modes in the order listed. An approving authority should be prepared to justify the particular mode authorized. The cost of the transportation is not the sole criterion to justify a particular mode.

(b) Most economical mode. An approving authority shall designate the most economical mode of transportation for the travel to be performed based on the following:

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- (1) the nature of the official business to be accomplished during the travel;
- (2) the time, to be taken by the traveler away from his duties in the City, the cost of transportation and the meals, lodging and incidental expenses estimated;
- (3) the number of persons who are traveling and the equipment and material that will be transported during the travel.

Approving authorities should approve only the number of travelers who are necessary to accomplish the purpose of the travel. Compliance with the Mayor=s Executive Order concerning the number of travelers will be required. The burden will be upon the approving authority to justify variances from this regulation.

3.06 Public motor vehicle. Travel by public motor vehicle will be performed according to rules promulgated by the Fleet Management Division. Currently the use of public motor vehicles for travel is prohibitive except in those cases where one has been provided to specific individuals. Therefore, the use of private motor vehicles, common carrier or chartered vehicles is necessary.

3.07 Common carrier. Travel by common carrier shall be authorized only at the coach fare rate, except that the first-class fare is authorized if coach fare is not available at the time the travel reservation was made or the ticket purchased. This must be certified in writing by the common carrier. This certification must be attached to the travel expense form when submitting for reimbursement.

The coach fare rate shall be that rate for the least expensive passenger travel on the common carrier, as stated in the carrier=s published tariffs. Where the common carrier is one of many carriers that provide the required transportation, the approving authority shall use the least expensive of all common carriers which were available and could provide the required transportation. If a traveler chooses to travel in an accommodation more expensive than coach without authorization by the approving authority, reimbursement shall be authorized only at the coach fare rate of the common carrier used.

3.08 Chartered vehicle. A chartered vehicle will be authorized by an approving authority when it is the most economical mode of transportation available. Usually this would be considered when there is a large or bulky amount of equipment or material to be transported, or, when there is a large group of travelers authorized to travel to the same destination. The transportation expense authorized by the approving authority shall be the cost of the charter, and incidental expenses applicable to the transportation of the authorized travelers in the chartered vehicle.

3.09 Private motor vehicle. A private motor vehicle may be authorized by an approving authority when there is no public vehicle or common carrier available, or would be less economical. Reimbursement for the use of a private vehicle will be according to Sec. 3.11.

3.10 Transportation furnished by another traveler. An approving authority shall not authorize or approve reimbursement for transportation expenses, whether actual or on a mileage basis, when a traveler is transported gratuitously by another traveler who is entitled to reimbursement for transportation expenses for the same travel. Without evidence to the contrary, it will be presumed that the traveler furnishing the transportation is entitled to reimbursement for the expenses of such transportation. The burden is on the traveler who is being gratuitously transported to show that he is, in fact, entitled to reimbursement for all or any portion of such transportation expenses. A statement of the facts shall be attached to the travel form. This statement shall be made under the same penalties of perjury as the travel form.

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3.11 Mileage reimbursement out of City travel. If travel outside the City is authorized by private motor vehicle, reimbursement is authorized at the rate per mile recognized by the United States Internal Revenue Service (IRS) pursuant to current IRS rules and regulations, for the distance actually traveled on official business, including travel to and from the destination and necessary vicinity mileage while at the destination; provided, that if the total mileage from point of origin to the travel destination, not including vicinity mileage, exceeds four hundred miles, the mileage reimbursement shall be limited to the lesser of;

- (a) the current IRS rate per mile for the entire distance including vicinity mileage; or
- (b) the airline common carrier coach fare from the City to the airport nearest the point of a travel destination for all travelers using the private motor vehicle, plus the IRS rate per mile for mileage equal to the distance from the airport to the point of a destination and for vicinity mileage.

No other reimbursement for transportation expenses, except incidental expenses as described in Section 3.13 of these regulations, will be authorized or approved when a private motor vehicle is used.

When traveling by common carrier, the traveler may claim reimbursement for automobile travel from his principal workplace to the terminal of the common carrier and return. The distance to the Jacksonville International Airport and return will not exceed fifteen miles in each direction. The mileage shall be entered on the travel form for mileage reimbursement claimed under this section.

3.12 Mileage reimbursement in city travel. The travel regulations contained in Sections 3.04 through 3.11 are available for travel performed on official business within the City. An employee who uses his private vehicle on official business within the City is entitled to reimbursement at the current rate per mile established by the IRS, at the time the mileage occurs. These reimbursements are paid by an entry into the payroll system in accordance with the time entry instructions in the Time Entry Help module. The reimbursement will be made for any time period the approving authority decides, except that in the case of requirements of the union contracts that payment is made within certain time frames, the using authority will make every reasonable effort to comply. The approving authority may stipulate to the forms required to be filled out by the employee, but in each instance will be required to maintain proper records in compliance with the Internal Revenue Service Regulations. In the event of an IRS audit the employer must prove that the payment was for a reimbursement and not subject to taxes. In no event will the forms and proof of expenses associated with automobile reimbursement be submitted to the Department, but will be maintained in the records of the approving authority.

3.13 Incidental transportation expenses. Enumeration; Limitations. The following expenses incidental to transportation of the traveler may be reimbursed by the approving authority:

- (a) taxi fares, if the traveler is traveling by common carrier, or by chartered vehicle incapable of being driven in the vicinity of the travel destination;
- (b) ferry fares; bridge, road and tunnel tolls, with receipts;
- (c) storage and parking fees; which may include drayage fees for equipment and material accompanying the traveler for official business;
- (e) communications expenses, including charges for telephone, telegraph, radiotelephone, radiotelegraph, facsimile transfer and cable messages and service between the City and the travel

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destination, between local points at the travel destination, and between the travel destination and other points on the travel itinerary, if necessary to confirm reservations or conduct official business.

(f) reasonable tips for transportation of baggage, not exceeding one dollar per bag per transfer, limited to no more than two dollars per transfers.

3.14 Lodging. Reasonable reimbursement will be made for the cost of lodging when the traveler is away from his place of residence overnight. If at all possible, lodging will be secured by advance reservation, and paid by a City check. In many cases this avoids the payment of local taxes, such as sales and uses tax, and in some locals the tourism taxes. The traveler should carry a copy of the City Tax Exemption Certificate as proof of the exemption from certain sales and uses tax. The traveler should make a reasonable effort to inform the provider of lodging of the City's exemption from such taxes. If the taxes are still assessed, reimbursement to the traveler is appropriate.

The least expensive single-room rate at the travel destination will be selected unless the approving authority authorizes another single-room rate consistent with the official business to be performed.

3.15 Meals. Authorization; limitation. Travelers are authorized to be reimbursed for meals while in travel status at the following fixed subsistence rates, or, at the travelers option, at the amount submitted but not in excess of the following maximum subsistence rates, only when travel begins before and extends beyond the times specified:

(a) Subsistence allowances. (i) breakfast: ten dollars, when travel begins before 6:00a.m. and extends beyond 8:00a.m.;

(ii) lunch: fourteen dollars, when travel begins before 12:00 noon and extends beyond 2:00p.m. ;

(iii) dinner: twenty six dollars, when travel begins before 6:00p.m. and extends beyond 8:00 p. m., or when travel occurs during nighttime hours due to special assignments.

Subsistence allowances are paid for individual meals if they are itemized on the travel form in Section III. The statement should show only those meals for which the traveler is authorized as defined in paragraph (a) of this part. Attention must be paid to the time limitation as stated in Section 106.708 O.C., and the constructive travel time as defined in Section 3.03 of this document.

(b) A fifty dollar per diem allowance is paid, at the option of the traveler, in lieu of subsistence allowances for meals on a day of travel only when travel begins before 6:00a.m. and ends after 8:00 p.m.. If travel begins subsequently to 6:00a.m.or ends prior to 8:00 p. m., the reimbursement for meals will be paid in accordance with the time and amount limitations as detailed in Section 3.15(a). If attending a conference, and the traveler is provided one or more meals without a specific charge being made for the meal, the traveler is not entitled to any per diem allowance for the day on which the meal is so furnished, nor for any subsistence allowance for the meal that was furnished. A meal provided by a common carrier is exempt from this ruling, and does not preclude the traveler from receiving subsistence or per diem allowance, if otherwise entitled.

3.16 Conference registration fees. Registration fees are allowable expenses of travel and may be paid in advance of the travel, paid by City check and taken to the conference or reimbursed to the traveler when paid by him, at the discretion of the approving authority. Registration fees must be accounted for on the travel form in Section III. For payment to be made or reimbursed, a traveler must submit a copy of the brochure describing the conference and a copy of the registration form to the

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Department at time payment is requested. If there was no advance for the registration, and traveler is to be reimbursed, a paid receipt must accompany the travel form.

PART 4. RECRUITMENT AND

RELOCATION EXPENSES

4.01 Scope. An approving authority may authorize reimbursement of expenses for a person being considered for top-level executive or professional positions who is a bona fide candidate, including such person who has been offered the position but has not yet accepted employment under the regulations in 106.710(b) O.C. Relocation expenses may be paid to or on behalf of any such person who has been offered and accepted employment with the City or Independent Agency, under the regulations in 106.710(c) and (d).

(a) Recruitment expenses. A traveler who is a candidate and is not a resident of the City, and when authorized by the approving authority, such person=s spouse, may be reimbursed for the following travel related expenses:

(1) round-trip travel, under the provisions and limitations of 106.706 O.C. from his current residence to the city and return, as often as authorized by the approving authority, for the purpose of employment interviews. Such authority may include such candidate=s spouse.

(2) While in the city for employment interviews, the traveler and spouse may receive reimbursement for lodging and meals in accordance with Part 3 of these Travel Regulations.

(3) If authorized by the approving authority, the traveler and spouse may receive reimbursement for travel within the City in compliance with Section 3.09 of these Travel Regulations and to the limitations of 106.706(c) O.R, for purposes of viewing the City and looking for suitable housing that may be available.

(b). Relocation Expenses. A traveler who has accepted employment, as defined in 106.701(f)(4)(ii) O.C., and who qualifies under 106.710(a)O.C., may be reimbursed for the following expenses in connection with relocating to the City.

(1) Transportation to seek permanent residence quarters in the City for the traveler and spouse, as provided by 106.706 O.C., and reimbursement for lodging and meals while traveling to and from the city and while in the city, under the limitations of 106.707 and 106.708 O.C.. Expenses for this purpose may be allowed for only one round trip.

(2) Transportation expenses, for the traveler and up to three members of his immediate family from his former residence to the city for the purpose of taking up residence. Limited to the provision of 106.706 O.C.

(3) Lodging and meals The traveler and up to three members of his immediate family may be reimbursed for lodging and meals in compliance with Part 3.14 and 3.15 of these regulations. In accordance with 106.710(c)(3) O.C., the traveler and each such member of his immediate family shall be entitled to a separate reimbursement at either the subsistence rates or per diem, whichever is applicable under 106.708 O.C.

(4) The approving authority may authorize reimbursement for the transporting, packing, crating, temporarily storing, draying and unpacking the household goods and personal effects of the traveler

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and his immediate family, but not in excess of a predetermined amount by weight to be specified in advance of such travel. If the traveler wishes to transport a house trailer or mobile dwelling for use as his permanent residence, the approving authority may authorize the following:

(i) A reasonable allowance, not in excess of twenty cents per mile, for transportation, if the traveler is transporting the house trailer or mobile dwelling; or,

(ii) Commercial transportation of the house trailer or mobile dwelling, or reimbursement therefore, including necessary tolls, charges and permit fees. But in either case payment under this paragraph may not exceed the amount approved under the first sentence of this section.

(c) None of the relocation expenses enumerated under paragraph (b) may be paid by the approving authority until and unless the newly hired employee agrees in writing, prior to the authorization of such travel and transportation, to remain in the employ of the authority for at least twelve months after his employment date, unless separated for reasons beyond his control and agreed to by the approving authority. If the individual violates this agreement, the money expended by the approving authority is recoverable from the individual as a debt due to the City or Independent Agency. The agreement may provide for a pro ration of the recoverable amount over and during the twelve-month period.

PART 5. LOBBYING AND LEGISLATIVE DELEGATION STAFF

5.01 General prohibition. Section 106.715, O.C. prohibits payment of any amounts paid or incurred for travel for the purpose of advocating passage or defeat of legislation by the Florida Legislature, except as provided therein. The prohibition is upon lobbying in general, not only upon travel to Tallahassee for the purpose of lobbying during sessions of the Legislature; therefore, travel to any point in the State for the purpose of lobbying is not-reimbursable under 106.715, O. C., whether or not the Legislature is in session.

5.02 Exceptions to general prohibition. The prohibition of 106.715, O.C. does not extend to lobbying activities before Congressional committees or subcommittee, nor to appearances before administrative, quasi-judicial or executive agencies, whether State or federal, for the purpose of supporting or opposing matters before such agencies. Travel may be authorized by approving authorities for such activities and appearances, and exceptions provided in 7-106 for travel in general.

5.03 Authorization for lobbying. When travel for the purpose of lobbying is authorized under any of the exceptions stated in 106.715(a)-(d), O.C., the request or approval shall be in writing and attached to or indicated on the travel form before it is transmitted to the Department for audit at the conclusion of the travel. A travel form submitted for travel expense reimbursement that appears to involve lobbying will be rejected by the Department and returned to the approving authority unless the authorization for the lobbying is attached to or indicated on it as required by this section.

5.04 Legislative delegation staff. The Coordinator and Secretary of the Duval County Legislative Delegation are entitled to reimbursement at the per diem rates authorized by 106.716, O.C. It is the responsibility of the Coordinator and Secretary to provide the Director with the latest approved per diem rates established by the President of the Florida Senate for senate employees. In the absence of the latest approved per diem rates, the Director will approve reimbursement only at the rates available to him or, if no such rates are available, at the rates authorized by 7-106, for other travelers.

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PART 6. DOCUMENTATION AND FORM REQUIREMENTS

6.01 Scope. This part of the travel regulations will dictate the method of preparing and submitting the travel form and documents. The form illustrated in 6.08, named City of Jacksonville Travel Form, is the only authorized and acceptable means of securing travel approval, advances and reimbursements of travel expenses. The Travel Form includes three sections; Section I Approval to Travel, Section II Advance Request, and Section III Expense Report.

This part is mandatory, and all approving authorities as designated in 106.103(h), O.C., and travelers are expected to comply.

6.02 Travel Approval. Section I of the Travel Form should be filled out by the traveler or designated travel coordinator for an agency. This section includes:

- (a) the traveler=s name;
- (b) the destination of the traveler;
- (c) the dates encompassed by the travel;
- (d) the name of the department, division or agency;
- (e) the index code to be charged for the expense;
- (f) the sub-object to be charged;
- (g) the reason for the travel
- (h) the estimated total amount of the travel (including advances and estimated out of pocket expenses, such as meals, mileage and incidental expenses);
- (i) the signature of the person authorizing and approving the travel, see part 6.05 of this document; and the typed/printed name of the person so designating;
- (j) the name and telephone extension of the contact person (usually the person designated by the department as the travel coordinator).

If no travel advance is necessary, Section II will be left blank and this approved form shall be maintained by the agency pending completion of travel.

6.03 Travel Advance; Section II This section will be filled out only if an advance is requested.

The information required is as follows:

- (a) name of common carrier, and amount to be paid to them. Please note: The agency under contract with the city is to be used to arrange air fare by all departments and agencies whose books are being maintained by the Department of Finance and Administration. An advance payment to them is not required as they will bill on a monthly basis, however, the air fare cost should be entered on this form where indicated.
- (b) name of lodging provider and amount to be paid to them, (single room rate times number of nights.)

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(c) name of payee for registration, as directed by the sponsor of the conference. Copy of brochure and application must accompany request for advance payment.

(i) if travel is for five complete days or more, per diem at \$50.00 per day may be requested to be payable to the traveler.

The original of this form which includes the approval (Section I) and the request for advance payments (Section II) shall be submitted to the Department together with any required documents for checks to be drawn. A copy of this approved form shall be maintained by the travel coordinator to be used for submitting a travel expense report to justify advances and request reimbursement of out of pocket travel expenses.

6.04 Expense Report; Section III. Section Three of the travel form must be filled out subsequent to the travel, and within five working days after completing the authorized travel; failure to account for the total amount of the advance within this time shall be prima facie evidence that the traveler owes the entire sum of the advance to the approving authority that made the advance. This sum may be recovered by civil action. This accounting must be filed with the Director, even in such cases where there is no reimbursement to the traveler. This ruling is to show justification of the travel advances. The traveler must include a detailed copy of the paid hotel bill and the traveler=s portion of the common carrier ticket stub. The following rules apply to this section:

(a) The approval to travel that was retained by the agency pursuant to section 6.05(a) of these regulations, or the copy of the original approval to travel should be completed as to Section III and submitted for an authorized signature. The traveler also signs this part to certify that it is true and correct in every material matter. Anyone submitting a false claim, or assisting in submitting a false claim shall be personally liable and shall be guilty of a class D offense. This form is then returned to the Department. Allow at least five (5) working days for the Department to audit the claims for travel expenses in accordance with 106.7 of the Ordinance Code and with these regulations. Any questionable expenses or failure to provide the necessary documentation will extend this time frame.

(b) The time of departure and the time of return will be entered on the first line of this section. It will not be necessary to repeat this information unless the traveler enters a non-travel status and reenters a travel status on the same day.

(c) Each day of travel (including partial days) will be entered in a separate column. The items of travel expense applicable to that day will be entered on the appropriate line of that column. Total cost of transportation and registration may be entered on day one (1) of travel.

(d) Per diem or meal allowances will be claimed as provided in section 3.15 of this document. When subsistence rates are used, the rates for the eligible meal will be entered in the column of the day claimed. If the per diem rate is used, the traveler must have been in travel status for the entire day from 6:00 a.m. through 8:00 p.m.

(e) Auto mileage must reflect actual miles traveled on official business, except as provided in section 3.11. The Florida Department of Transportation Maps will be the official source of mileage between destinations. The chart herein provided as Part 6.07, contains the most frequently used travel destinations. Any other miles traveled must be reported as vicinity miles. The approving authority shall determine if vicinity miles seem reasonable or excessive.

(f) All other expenses associated with travel are to be entered on the form in the appropriate place.

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(g) The traveler's copy of the common carrier ticket stub, detailed paid hotel bill, parking receipts, toll receipts, storage or drayage receipts and taxi or ferry fare receipts must accompany the request for reimbursement. If the registration was not paid for an advance, a copy of a receipt and a copy of the brochure is required.

(h) An affidavit for each undocumented travel expense must be provided in lieu of actual receipts.

6.05 Designation of Authority to Approve Travel. Chapter 106.701(b) O.C., defines the approving authority as:

(a) the council in accordance with council rules for members of the council, council staff or council auditors;

(b) governing body of an agency for members of that independent agency;

(c) chairman or vice-chairman of the board of an independent agency for the chief executive officer of that agency;

(d) elected official (other than the council) for the elected official;

(e) the chief executive officer of an agency for all travelers of an agency;

(f) department director for all travelers of his department;

(g) in the case of any other office, the person in charge of the office; or,

(h) if no department or office is involved, the Mayor or his designee.

Current regulations, per Mayor's executive order, require a BU FORM H approval by the budget office prior to travel for all offices under the Mayor.

6.06 City Contractor - Air Travel. The use of the contractor obtained by RFP is required by all departments and agencies whose books are maintained by the Department of Administration and Finance. Each month the travel agency will bill for the travel on a separate statement by department. The department head or other approving authority will verify these charges and sign to show approval to pay. This statement will then be forwarded to the Department for a check to be drawn.

6.07 Mileage Chart. The mileage chart attached is to be referred to for the distance to the destinations from the City. This chart will become part of these regulations and shall be known as Part 6.07. Any destinations not shown may be determined by the American Automobile Association maps.

6.08 Authorized Form. The Travel Form attached is to be used for approval, advances, justification of advances and reimbursement of travel expenditures. Any forms in official use before the effective date of these travel regulations are superseded by the form prescribed herein.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
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ORDINANCE CODE
City of
JACKSONVILLE, FLORIDA

All bills enacted through September 26, 2017.
(Supplement No. 47, Update 3)

Chapter 106 BUDGET AND ACCOUNTING CODE*

PART 7. TRAVEL EXPENSE REIMBURSEMENT

Sec. 106.701. Definitions.

As used in this part:

- (a) *Agency* includes all of the agencies listed in [Section 106.103\(h\)](#) and the Duval County School Board.
- (b) *Approving authority* means:
 - (1) As to travel by members of the Council and the Council staff, the Council, in accordance with its rules.
 - (2) As to travel by members of an independent agency (including the Duval County School Board), the governing body of the agency.
 - (3) As to travel by the chief executive officer of an independent agency (including the Duval County School Board), the chairman or vice-chairman of the agency.
 - (4) As to travel by an elected official, other than a member of the Council, the elected official.
 - (5) As to travel by the employees of an agency and by other travelers to be reimbursed from agency funds, the chief executive officer of the agency.
 - (6) As to all other travel to be reimbursed from city funds, the appropriate department director or a deputy director designated by the director, or, in the case of other offices, the official in charge of the office, or, if no department or office is involved, the Mayor or his designee.
- (c) *Common carrier* means commercial means of transportation operating scheduled vehicles, and rental vehicles of an established rental firm.
- (d) *Conference* includes any conference, convention, seminar, short course, or similar assembly of persons.
- (e) *Household goods and personal effects* means such personal property of a traveler under subsection (f)(4)(ii) of this Section and his dependents as the approving authority authorizes to be transported or stored at the expense of the approving authority, but not including motor vehicles.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 2 of 10)

- (f) *Traveler* means a person in one of the following categories:
- (1) An officer or a full-time employee of the city or of an agency.
 - (2) A person other than an officer or full-time employee who is authorized by the approving authority to incur travel expenses in the performance of his official duties.
 - (3) A person who is called upon by the city or an agency to contribute time and services as a consultant or advisor.
 - (4) A person who:
 - (i) Is a candidate for an executive or professional position but is not a resident of the city, and, when authorized by the approving authority, such person's spouse; or
 - (ii) Has accepted employment with the city or independent agency in an executive or professional position and is not, at the time of such acceptance, a resident of the city.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 1; Ord. 83-591-400, § 1)

Note—Former [§ 126.701](#)

Sec. 106.702. Scope.

The provisions of this Part 7 shall apply to and authorize reimbursement for expenses incurred in connection with travel performed to and from destinations outside the City on official business of an agency. This part shall be the exclusive authority for reimbursement for such travel expenses. The Director of Finance and Administration is authorized to make rules for the implementation of this part.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1; Ord. 2016-140-E § 16)

Editor's note—

Ordinance 2007-839-E, § 18, authorized updated department/division names pursuant to reorganization.

Note—Former [§ 126.702](#)

Sec. 106.703. Authority for reimbursement for travel expenses.

No traveler may be reimbursed for travel expenses pursuant to this part unless he has obtained, in advance of performing the travel, written approval to travel from the approving authority. Reimbursement shall be made only to travelers and shall be made only for those expenses necessarily incurred by them in the performance of a public purpose authorized by law to be performed by the agency whose funds are involved. No traveler shall be allowed to receive funds or be reimbursed for travel as a gift to an individual from any prohibited party as such party is identified in Section 602.701, Ordinance Code, and, F.S. § 112.3148. Any receipt of funds or reimbursement for travel as a gift to an individual from any other non-prohibited party for City business may only be done upon prior written approval from the Ethics, Compliance and Oversight Office and the Office of the General Counsel. Disclosure and/or reporting of such gifts shall be in accordance with all applicable Federal, State and local law.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1; Ord. 2013-351-E, § 1)

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 3 of 10)

Sec. 106.704. Constructive point of origin.

For purposes of reimbursement of travel expenses, all travel shall be deemed to have commenced at the place where the majority of the work of the traveler is performed, in the case of officers and employees of an agency, and at the usual place of business or residence or the place where the travel actually commenced, whichever is less, in the case of other travelers.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1)

Note—Former [§ 126.704](#)

Sec. 106.705. Constructive travel time.

For purposes of reimbursement for travel expenses, all travel shall be deemed to have commenced at the time the traveler actually commenced travel or at the latest time the traveler could reasonably have departed in order to arrive at his destination at the time required to accomplish the purpose of the travel, whichever is later.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1)

Note—Former [§ 126.705](#)

Sec. 106.706. Transportation expenses.

- (a) Reimbursement shall be made only for travel performed over a usually traveled route to the destination. When travel is by indirect route for the traveler's own convenience, reimbursement for expenses shall be based only on such charges as would have been incurred by travel over a usually traveled route.
- (b) Reimbursement may be made for travel performed by public motor vehicle, common carrier, chartered vehicle or privately-owned vehicle, as approved by the approving authority in advance of the travel subject to the regulations provided in this part and the rules of the Director of Finance. The approving authority shall designate the most economical mode of travel, taking into consideration the following factors:
 - (1) The nature of the business.
 - (2) The time of the traveler, cost of transportation and meals, lodging and incidental expenses required.
 - (3) The number of persons traveling and the equipment and material to be transported.
- (c) With respect to travel by motor vehicle:
 - (1) Travel by public motor vehicle shall be performed in accordance with the rules of the Fleet Management Division. Travel by private motor vehicle in lieu of a public motor vehicle or common carrier may be authorized by an approving authority if a public motor vehicle is not available or would be less economical.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 4 of 10)

- (2) If travel is by private motor vehicle, reimbursement is authorized at the rate per mile authorized and recognized by the United States Internal Revenue Service (IRS) pursuant to current IRS rules and regulations. All mileage shall be computed from the constructive point of origin, as provided in [Section 106.704](#), to the point of destination. When possible, mileage shall be based upon the current map of the State Department of Transportation. Vicinity mileage necessary for the conduct of official business may also be reimbursed, when separately stated. If the total mileage from point of origin to point of destination exceeds 400 miles, the mileage reimbursement shall be limited to the lesser of:
- (i) The IRS rate per mile.
 - (ii) The airline common carrier coach fare to the nearest airport for all travelers using the private motor vehicle plus the IRS rate per mile from the airport to the point of destination.

No other reimbursement for expenses related to the operation, maintenance and ownership of a vehicle shall be allowed when a private motor vehicle is used on public business.

- (3) The provisions of this subsection shall be available for travel performed on public business within the city.
- (d) Transportation by a chartered vehicle when traveling on official business may be authorized by the approving authority if it is the most economical mode of travel available.
- (e) All travel by common carrier shall be reimbursed only at the coach fare rate, except that the first-class fare rate is authorized if coach fare is not available, as certified in writing by the common carrier. A reimbursement request for common carrier fare shall be accompanied by the traveler's copy of the ticket or an actual receipt.
- (f) No traveler shall be reimbursed for transportation expenses, either mileage or actual, when he is gratuitously transported by another traveler who is entitled to reimbursement for transportation expenses.
- (g) The following expenses incidental to transportation of the traveler may be reimbursed:
- (1) Taxi fare.
 - (2) Ferry fares, and bridge, road and tunnel tolls.
 - (3) Storage and parking fees.
 - (4) Communication expenses.
 - (5) Reasonable tips for transportation of baggage, as fixed from time to time by the Director of Finance.

(Ord. 77-691-638, § 2; Ord. 80-250-87, § 1; Ord. 83-591-400, § 1; Ord. 91-352-205, § 1; Ord. 91-1149-435, § 1; Ord. 2016-140-E § 16)

Editor's note—

Ordinance 2007-839-E, § 18, authorized updated department/division names pursuant to reorganization.

Note—Former § 126.706.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
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Sec. 106.707. Lodging.

Reimbursement is authorized for lodging expense whenever the traveler is reasonably required to be away from the city overnight or, in the case of a traveler who is not employed in the city, away from the location of his residence overnight. Reimbursement requests for lodging expenses shall be accompanied by actual receipts. Lodging shall be reimbursed at the reasonable, actual and necessary expense thereof, not to exceed the single-room rate. A traveler shall select lodging which is the most economical available consistent with the duties being performed.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1)

Note—Former § 126.707.

Sec. 106.708. Meals.

- (a) Reimbursement is authorized for meals for all travelers while in a travel status at the following fixed subsistence rates, or, at the traveler's option, at the amount submitted, not to exceed the following fixed maximum subsistence rates, but in any case only when travel begins before and extends beyond the times specified:
- (1) Breakfast: \$10, when travel begins before 6:00 a.m. and extends beyond 8:00 a.m.
 - (2) Lunch: \$14, when travel begins before 12:00 noon and extends beyond 2:00 p.m.
 - (3) Dinner: \$26, when travel begins before 6:00 p.m. and extends beyond 8:00 p.m., or when travel occurs during nighttime hours due to special assignments.
 - (4) At the option of the traveler, a *per diem* rate of \$50 will be paid for an entire day when travel begins for that day before 6:00 a.m. and extends beyond 8:00 p.m. This per diem rate is in lieu of individual meal allowances and may not be claimed for a day of travel if subsection (b) of this Section applies to that day.
- (b) No reimbursement is authorized for any meal which is made available without specific charge therefor to travelers attending a conference.

(Ord. 77-691-638, § 2; Ord. 81-526-234, § 1; Ord. 83-591-400, § 1; Ord. 2004-604-E, § 1)

Note—Former § 126.708.

Sec. 106.709. Registration fees.

Reimbursement is authorized for registration fees and other expenses incident to the attendance by travelers at conferences.

(Ord. 77-691-638, § 2; Ord. 83-591-400, § 1)

Note—Former § 126.709.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 6 of 10)

Sec. 106.710. Recruitment and relocation expenses.

- (a) An approving authority may approve the payment of recruitment and relocation expenses only for persons being considered for such top-level executive or professional positions as have been defined, approved and to the extent limited by Council resolution and for persons who have been newly hired in such positions but who have not yet become residents of the city. Recruitment expenses may be paid to any such person who is a *bona fide* candidate, including a person who has been offered employment but has not yet accepted such employment, under the regulations in subsection (b) of this Section. Relocation expenses may be paid only to or on behalf of any such person who has been offered and who has accepted employment with the city or independent agency, under the regulations in subsections (c) and (d) of this Section.
- (b) A traveler who is a candidate, as defined in [Section 106.701\(f\)\(4\)\(i\)](#) and qualifies under the criteria of [Section 106.710\(a\)](#); may be reimbursed for round-trip travel, under the provisions and limitations of [Section 106.706](#), from his current place of residence to the city and return, as often as authorized by the approving authority, and such authority may include such candidate's spouse, for the purpose of employment interviews. While in the city for employment interviews, the traveler (and authorized spouse) may receive reimbursement for lodging and meals, under the provisions and limitations of Sections [106.707](#) and [106.708](#). If authorized by the approving authority, the traveler (and authorized spouse) may receive reimbursement for travel within the city, under the provisions and limitations of [Section 106.706\(c\)](#), for the purpose of viewing the city and looking for suitable housing that may be available in the city.
- (c) A traveler who has accepted employment, as defined in [Section 106.701\(f\)\(4\)\(ii\)](#) and qualifies under the criteria of [Section 106.710\(a\)](#), may be reimbursed for the following expenses in connection with relocating in the city:
 - (1) Transportation to seek permanent residence quarters in the city for the traveler and spouse, under the provisions and limitations of [Section 106.706](#), and reimbursement for lodging and meals while traveling to and from the city and while in the city, under the provisions and limitations of Sections [106.707](#) and [106.708](#), for this purpose. Expenses under this paragraph may be allowed for only one round trip.
 - (2) Transportation expenses, under the provisions and limitations of [Section 106.706](#), for the traveler and up to three members of his immediate family from his former place of residence to the city for the purpose of taking up residence in the city.
 - (3) Lodging and meals, under the provisions and limitations of Sections [106.707](#) and [106.708](#), for the traveler and up to three members of his immediate family while en route between his former place of residence and the city. For the purposes of this paragraph, the traveler and each such member of his immediate family shall be entitled to a separate reimbursement under [Section 106.708](#), at either the subsistence rates allowed by [Section 106.708\(a\)\(1\)–\(3\)](#) or the per diem rate allowed by [Section 106.708\(a\)\(4\)](#) for all persons traveling together.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
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- (4) The expenses of transporting, packing, crating, temporarily storing, draying and unpacking the household goods and personal effects of the traveler and his immediate family, not in excess of a maximum amount by weight to be specified by the approving authority in advance of the authorization of such transportation. In lieu of such transportation, the approving authority may authorize the traveler who transports a house trailer or mobile dwelling for use as his permanent residence in the city to receive:
 - (i) A reasonable allowance, not in excess of \$0.20 per mile, for transportation of the house trailer or mobile dwelling, if the trailer or dwelling is transported by the traveler; or
 - (ii) Commercial transportation of the house trailer or mobile dwelling at public expense, or reimbursement to the traveler therefor, including the payment of necessary tolls, charges and permit fees, if the trailer or dwelling is not transported by the traveler; but in either case payment under this sentence may not exceed the maximum payment to which the traveler otherwise would be entitled under the first sentence of this Section for transportation and temporary storage of his household goods and personal effects.
- (d) An approving authority may pay relocation expenses under subsection (c) of this Section only after the newly hired employee agrees in writing, prior to the authorization of such travel and transportation, to remain in the service of the approving authority for at least 12 months after his employment date, unless separated for reasons beyond his control which are acceptable to the approving authority. If the individual violates the agreement, the money spent by the approving authority for the expenses and allowances authorized under subsection (c) of this Section is recoverable from the individual as a debt due the city or independent agency, as the case may be; provided, that the agreement may provide that the amount recoverable shall be reduced on a periodic basis during the 12-month period.

(Ord. 81-775-491, § 3; Ord. 83-591-400, § 1)

Editor's note—

Res. 82-468-167 and Res. 83-646-206 defined and approved certain positions within the JEA as "top-level executive or professional positions," but limited reimbursements under this Section to no more than five such positions in any fiscal year without further Council approval.

Note—*Former § 126.710.*

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 8 of 10)

Sec. 106.711. Advances.

An approving authority may authorize an advance to cover anticipated costs of travel. The amount of the advance may include estimated costs of transportation, lodging and meals of the traveler and any person transported in the care or custody of the traveler in the performance of his duties subject to final accounting when the travel has been completed. Payment for common carrier fare shall be made directly to the carrier. Payment for lodging shall be made directly to the place furnishing the lodging. Payment for a registration fee shall be made as directed by the sponsor of the conference. A traveler who is provided with a cash advance to cover anticipated costs of travel shall be personally liable for the amount thereof and shall account to the approving authority for the expenditure thereof within five working days after completing the authorized travel; failure to account for the total amount of the cash advance within this time shall be *prima facie* evidence that the traveler owes the entire sum so advanced to the city or agency that made the advance, which may be recovered by a civil action.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1)

Note—Former § 126.711.

Sec. 106.712. Request for reimbursement.

The Director of Finance and Administration shall establish a uniform travel reimbursement form which shall be used by all travelers when requesting reimbursement for traveling expenses under this part. In addition, the Director of Finance and Administration is authorized to consider the special needs of an independent agency and to establish a travel expense reimbursement form that better suits the needs of such independent agency; provided however, the independent agency continues to follow the provisions of this part with respect to travel expense reimbursement. No travel expense shall be reimbursed unless it is requested on the established form and is accompanied by approved authorization to travel required by Section 106.703. Travel expense reimbursements shall be approved prior to payment by the Director of Finance and Administration, as to requests for reimbursement from City funds, and by the Chief Finance Officer or Controller of an agency, as to requests for reimbursement from independent agency (including the Duval County School Board) funds. The approving officer may designate a subordinate to perform this function.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1; Ord. 2001-446-E, § 2, Ord. 2016-140-E § 16)

Editor's note—

Ordinance 2007-839-E, § 18, authorized updated department/division names pursuant to reorganization.

Note—Former § 126.712.

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 9 of 10)

Sec. 106.713. Fraudulent claims.

Every claim submitted pursuant to this part shall be substantiated by receipt or voucher, shall contain a statement that the expenses were actually incurred by the traveler as necessary traveling expenses in the performance of his official duties and shall be accompanied by a written declaration that it is true and correct as to every material matter. Any person who wilfully makes and subscribes any such claim which he does not believe to be true and correct as to every material matter, or who wilfully aids or assists in, or procures, counsels or advises the preparation or presentation under the provisions of this part of a claim which is fraudulent or is false as to any material matter, whether or not such falsity or fraud is with the knowledge or consent of the person authorized or required to present such claim, shall be guilty of a class D offense. Whoever shall receive an allowance or reimbursement by means of a false claim shall be personally liable in the amount of the fraudulent payment for the reimbursement of the public fund from which the claim was paid.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1)

Note—Former § 126.713.

Sec. 106.714. Travel outside continental United States.

The City and its Independent Agencies are authorized to make reimbursements at double the rates provided in this part for travel expenses incurred outside the continental United States. Any such reimbursements shall remain subject to all other limitations, restrictions and exceptions provided in this part.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1; Ord. 2004-604-E, § 2)

Note—Former § 126.714.

Sec. 106.715. Travel expenses for lobbying.

No appropriation shall be encumbered or expended for travel for the purpose of advocating passage or defeat of state legislation, and no officer or employee of the city or any independent agency shall perform any such travel or advocacy during official duty hours, except:

- (a) As requested in writing by a committee or subcommittee of the Florida Legislature or by the Duval delegation thereto.
- (b) With respect to independent agencies, as approved in advance by the governing body of the independent agency.
- (c) With respect to members or employees of the Council and members or employees of boards appointed by the Council, as approved in advance by the Council or in accordance with its rules.
- (d) With respect to the Mayor and other officers and employees of the city, except as provided in subsection (c) of this Section, as approved in advance by the Mayor or his designee.

(Ord. 77-691-638, § 2; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1)

EXHIBIT 14 – Chapter 106, Part 7, Ordinance Code
(Page 10 of 10)

Sec. 106.716. Reimbursement to Duval County legislative delegation coordinator and secretary.

The Director of Finance and Administration is authorized to make reimbursement to the Coordinator and Secretary of the Duval County legislative delegation at the per diem and travel rates established by the Joint Legislative Management Committee of the Legislature, notwithstanding the rates authorized by Sections 106.706, 106.707 and 106.708.

(Ord. 79-1363-684, § 1; Ord. 80-1138-577, § 1; Ord. 81-775-491, § 2; Ord. 83-591-400, § 1, Ord. 2016-140-E § 16)

Editor's note—

Ordinance 2007-839-E, § 18, authorized updated department/division names pursuant to reorganization.

Note—Former § 126.716.

VI. OFFICE SUPPLIES, ADVERTISING, MAIL OUTS, STATIONERY, & BUSINESS CARDS

A. Procedures for Ordering Supplies

(Page 1 of 2)

ORDERING SUPPLIES, EQUIPMENT, & SERVICES PROCEDURES AND REQUIREMENTS

Rev. January 1, 2018

The following procedures have been established to ensure all that requests are processed in compliance with the Purchasing code and other applicable laws.

ADMINISTRATIVE PROCEDURES

The Administrative Assistant II is responsible for maintaining the inventory of standard office supplies, which includes ordering all office supplies and equipment, both standard and special orders. Other employees do not have the authority to purchase any goods or enter into any agreements for services that would result in cost to the Office of City Council.

Office Supplies

Office supplies are located in the Copy/Supply Room in Suite 425 near the Director's Office. The Supply Room is stocked with standard office supplies such as paper, pens, folders, envelopes, ink cartridges, etc. Special orders to meet an individual's personal preference (for a different brand or type than what is already provided) are not accepted. However, special order items do include items like calendars, trash cans, scissors, desk trays, etc. (items needed on an individual basis that are not routinely stocked) and are ordered upon request, subject to approval by the Council Director.

To request specific supplies that are not stocked in the supply room, please refer to the current office supply catalog (issued to each Executive Council Assistant) to locate the item(s). Send a detailed email to Administrative Assistant II, Nancy Carlos, that includes the item description, item number, page number, price, quantity needed, and brief explanation of need. In the absence of the Administrative Assistant II, supply requests are accepted by the Chief of Administrative Services.

Equipment

Employees are provided with standard office equipment such as computers, printers, monitors, and telephones. Requests for equipment not provided must be approved in advance by the Council Director. Employees are not authorized to remove equipment or supplies from the City Council offices without approval from the Council Director.

Services

To report issues or to request assistance with computers, printers, telephones, or recording equipment, contact one of the City Council's IT Staff, Steve Cassada or Louie Marino. In most cases, the Office of City Council can meet the need internally, thereby reducing costs associated with outside sources. If an employee requires service from an outside entity, a request stating the specific need must be made to the Council Director.

A. Procedures for Ordering Supplies

(Page 2 of 2)

Mass Mailings & Other Projects

Copiers and printers located in the City Council suites are intended for small print jobs and are not to be used for large projects. Large projects, defined as more than 50 one-sided black & white pages or more than 25 one-sided color pages, should be sent via email to the Copy Center at COPYCENTER@coj.net to request a quote for the cost of supplies and services (see *POLICY AND PROCEDURES FOR USING CENTRAL COPY CENTER SERVICES* attached). Cheryl Brown, Council Director, and Laura Dyer, Executive Administrator must be copied on the email so that verification of available funds and approval can be accomplished on the same email thread. The Copy Center is not authorized to perform any services without first having the approval of the Council Director.

Internal city services, like the Copy Center, charge the cost of their supplies and services to the requesting department's budget. District Council Members are allocated a specific amount each fiscal year for large print jobs and postage. The fiscal year allocation is determined during the Budget preparation process for the following fiscal year. At-Large Council Members receive no allocation, but may request approval from the Council President for specific projects. The City Council policy and procedures for mass mailings, large print jobs, and other projects is attached to this section.

- Effective October 1, 2017, District Council Members are allocated \$1,000 per fiscal year and At-Large Members have no allocation. However, if an At-Large Council Member requires printing and/or mailing services, the Council President may authorize the expenses.

The Office of City Council uses standard 4.25" x 6" cards for large mailings. These cards are ordered upon request and are most commonly used for Community Meeting notices. Any other form of mass mailing, including the use of envelopes, requires special approval by the Council Director. (See example)

EXHIBIT 15 – Copy Center Services Policy and Procedures

POLICY AND PROCEDURES FOR USING CENTRAL COPY CENTER SERVICES

1. The Copy Center will perform print/copy/assembly/mailing jobs for Council Members. Prior approval by the Council Director for each job is required and expenses are monitored to ensure no Council Member exceeds their annual allocation. Although this does not include routine mail, mass mailings (more than 25 pieces of mail), packages, and large print jobs (more than 50 one-sided black & white pages or more than 25 one-sided color pages) require prior approval by the Council Director and will be processed by the Copy Center. The printers located in the Council suites are not to be used for large print jobs.
2. A request form will be initiated by the Executive Council Assistant (ECA) for any services requested by their Council Member. This includes requests for all services, i.e. printing, copying, assembling, binding, and mass or bulk mailing. The request form is submitted via email (request form attached) to the email group COPYCENTER, as well as Laura Gade, Cheryl Brown (Council Director), and Laura Dyer (Executive Administrator).
3. Once a request for services has been received by the Copy Center, a cost estimate for each job (including postage if associated with print job and/or it exceeds 25 pieces of first class mail) will be provided to the Executive Administrator to determine funding availability and to the Council Director for consideration, prior to the commencement of any services performed.
4. The Copy Center is not authorized to perform any services for Council Members or their ECAs (including but not limited to those services specified in #2 above) without approval from the Council Director.
5. Expenses for **Council Members** will be charged to internal services accounts for **Fund 00111, Cost Center 223001, and Activity 549512 (Copy Center Projects) and/or 549529 (Postage)**. The Executive Administrator will maintain account balances to ensure that no Council Member exceeds their annual allocation and that funds are available.
6. Expenses for the **Value Adjustment Board** will be charged to internal services accounts for **Fund 00111, Cost Center 222001, and Activity 549512 (Copy Center Projects) and/or 549529 (Postage)**. The Value Adjustment Board staff will be responsible for notating the VAB fund, cost center, and activity for all services requested.
7. Employees from other departments, including but not limited to the Council Auditor's Office and Office of General Counsel, are not authorized to charge any services to the City Council's budget, without prior approval by the Council Director.

The Copy Center will process requests for routine services by **Administrative Services, Legislative Services, Research, and the Office of Director**, with or without the Director's signature. These expenses will continue to be billed to **Fund 00111, Cost Center 221001, Activity 549512 (Copy Center Projects) and/or 549529 (Postage)** (the operational budget for the City Council). *REQUEST FOR SERVICES FORM ATTACHED & ALSO AVAILABLE ON THE EMPLOYEE PORTAL, COPY CENTER, SHARED DOCUMENTS.*

EXHIBIT 16 – Copy Center Services Request Form

COPY CENTER JOB REQUEST FORM

Requester Name: _____ Date: _____

Phone Number: _____ Dept./Div.: _____

Non-Project Related Accounting Info:

* Fund _____ * Center _____ * Activity _____

Project Related Accounting Info:

* Project# _____ * Owning Org. _____

* Exp. Type _____ * Task _____ * Award _____

**** Email job request form to copycenter@coi.net

Originals/pages _____ Copies/Sets _____

Date & Time Required _____

Item Description: _____

Stock Size:

- ☐ 8 ½ x 11
- ☐ 8 ½ x 14
- ☐ 11 x 17
- ☐ Other
- ☐ Provided

Color Stock:

- ☐ White
- ☐ Blue
- ☐ Canary
- ☐ Salmon
- ☐ Green
- ☐ Other
- ☐ Tabs

Scanning Required:

- ☐ To CD
- ☐ To pdf

- ☐ Heavy Stock – Index
- ☐ Special Order Stock

Printing Required:

- ☐ 1 Sided
- ☐ 2 Sided
- ☐ Head to Tail
- ☐ Head to Head
- ☐ Color
- ☐ Black & White

Finishing:

- ☐ Collated
- ☐ Single Staple
- ☐ Bound / ☐ Prong Fasteners / ☐ GBC
- ☐ Uncollated
- ☐ Double Staple
- ☐ 3 Hole Punch
- ☐ Padded
- ☐ Delivery Outside St. James
- Yes / ☐ No / ☐

Special Instructions:

Control Number: _____

Revised February 20, 2020

B. Procedures for Advertising

ADVERTISING PROCEDURES AND REQUIREMENTS

The following procedures have been established to ensure that all advertising for meetings and other City Council events is processed in compliance with the Purchasing Code:

ADVERTISEMENTS

Approval

Council Members may request that their community meetings be advertised in The Florida Times Union (and other newspapers upon request). All advertising must be submitted to the Chief of Administrative Services in order to be placed. Neither Council Members, nor Executive Council Assistants are permitted to place their own ads.

Specifications

It is the requesting staff member's responsibility to specify which newspaper and to ensure that all of the information in the ad is correct including spelling, dates and times, and location. The document(s) must be initialed by the staff member indicating their approval prior to the placement of the ad.

The standard size for ads will be 3" x 5". Requests for ads in other sizes must be approved by the Director.

When advertising in The Florida Times Union, the ad will be placed in the Community Paper section. Requests for ads to be placed in other sections require the Director's approval.

EXHIBIT 17 – Example of Mass Mailing Post Card



OFFICE OF CITY COUNCIL
City Hall-117 W. Duval St., Ste. 425
Jacksonville, Florida 32202



CORRECTION

COUNCILMAN MICHAEL CORRIGAN
INVITES YOU TO ATTEND
A FOLLOW-UP MEETING

JTA/RAPID TRANSIT SYSTEM PROJECT

THURSDAY, June 8, 2006

6:00 ~ 7:00 p.m.

FCCJ – Kent Campus
Auditorium

Guests will include representatives from the
Jacksonville Transportation Authority.

All interested parties are invited to attend.
Please call 630-1677 for more information