

While on official business, the employee makes a call of three minutes or less to announce a safe arrival, a delay, or a change in plans. PTAB may request written confirmation from the employee that a call qualifies in this instance.

Employees are encouraged to restrict any use of telephone services to such non-work time as lunch periods or before/after their scheduled work hours. Personal calls that must be made during work hours through the use of state equipment may be permitted if:

- The call is charged to the employee's home phone or other non-government number;
- It is made to an "800" or other toll-free number;
- It is charged to the called party if a non-state number; or,
- It is charged to a personal credit card.

Collect and third-number calls requiring operator assistance are prohibited except when absolutely necessary in extreme emergencies. Third number calls are those billed to a telephone number other than the calling or called number and are not credit card or collect calls.

For any use of state telephones beyond the parameters of this policy, an employee will be charged actual Department of Central Management Services (CMS) billed charges.

The employee shall reimburse the state for toll and other charges by personal check payable to the appropriate fund designated by PTAB. If PTAB presents a statement of itemized telephone calls to the employee and the employee fails to reimburse the state voluntarily within 30 days for those calls which fall outside the parameters of the telephone usage policy, or if it is determined that the employee has abused the telephone usage policy, collection action will be instituted through appropriate legal means. An employee is put on notice that the payment of toll and other charges does not prevent the agency from instituting appropriate disciplinary action.

This telephone policy should be considered by employees to reasonably apply by extension to other electronic equipment provided by PTAB, such as pagers, cell phones, or fax machines. Increasing numbers of staff members carry their own personal mobile phones. The policy for phone calls described above also applies to employees' mobile phones and includes text messaging. Employees are asked to keep their personal mobile phones or other texting devices off during work hours, unless needed for specific work-related purposes, in cases of emergency, or with permission from the employee's supervisor. If such communications are necessary while en route, in the interest of safety for yourself and others you should first pull over and stop the car.

Section 7.2 (b) Travel and State Vehicles

Many PTAB employees are required to travel in order to accomplish assigned duties. PTAB utilizes the Travel Guide for State Employees, posted on our Intranet site, to set out guidelines for employees to follow (*also see 44 Ill.Adm.Code Section 5040.350, cited below*). Employees who will be traveling during

Approved 
Louis G. Apostol

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the course of their duties should familiarize themselves with the contents of this manual. Failure to comply with the travel regulations may result in disciplinary action and/or can delay (or possibly eliminate) payment for reimbursement of expenses. Employees are required to use the PTAB fleet of vehicles, unless no vehicle is available for use or other means of travel is determined to be more cost effective and efficient, as determined by the Executive Director of the Property Tax Appeal Board. Use of public transportation or private vehicles for state related business shall not be eligible for reimbursement expenses unless prior approval is obtained from the Executive Director of the Property Tax Appeal Board or Vehicle Coordinator.


44 Ill. Adm. Code Section 5040.350 states in relevant part:

a) State-owned vehicles shall only be used for public purposes and in the best interests of the State. When performing official duties on behalf of the State, authorized uses include:

- 1) travel between places of State business, places of temporary lodging, places to obtain meals, and/or other locations necessary to perform official duties;
- 2) travel to/from places to obtain emergency medical assistance or supplies;
- 3) transport of:
 - A) other State officers or employees who are on official State business;
 - B) consultants or contractors working on behalf of the State;
 - C) commercial firm representatives working with the State;
 - D) wards of the State;
 - E) residents of State facilities or institutions; and
 - F) others as authorized in writing by an agency head;
- 4) transport of materials, equipment, supplies, tools, parcels, luggage, or other items necessary or required to perform official duties;
- 5) operation of a State vehicle by a State contractor when required to meet the needs of a State contract and when authorized in writing by an agency head;
- 6) operation of a State vehicle when on a travel-related assignment (including, but not limited to, pick-up and return of a vehicle and necessary commuting);
- 7) commuting in an assigned vehicle when one of the conditions set forth in Section 5040.340 of this Part is met and the employee has complied with:
 - A) the certification requirements of Section 7-601 of the Illinois Vehicle Code [625 ILCS 5/7-601]; and
 - B) all applicable reporting requirements of the Office of the Comptroller;
- 8) operation of a specially equipped vehicle where a State official or employee is required to have constant access to the equipment in the vehicle (for purposes of this Section, "specially equipped vehicle" means a vehicle equipped with communications equipment regularly used to transmit over a network of the Emergency Management Agency); and
- 9) any other use when for public purposes and in the best interests of the State, and authorized in writing by an agency head.

b) Unauthorized use of a State-owned vehicle includes, but is not limited to:

- 1) transportation for shopping, meals, entertainment, recreation or vacation purposes unrelated to the performance of official State business;
- 2) transport of any person for any purpose unrelated to official State business;

Approved 
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- 3) operation of a vehicle beyond the vehicle's rated capability;
 - 4) transport of materials, equipment, supplies, tools, parcels, luggage, or other items unrelated to the performance of official State business;
 - 5) transport of hazardous or dangerous materials such as acids, explosives, weapons, ammunition, or highly flammable materials unless authorized in writing by an agency head or in an emergency;
 - 6) transport of items or equipment that may constitute an obstruction of safe driving or hāzārd tō pēdēstriāns or othēr vehicleś; and
 - 7) any use in violation of applicable statute, rule, or executive order.
- c) Any employee or official using a State vehicle in a manner contrary to this Section shall be personally responsible for and assume the risk of:
- 1) personal injury to the employee/official and to third parties; and
 - 2) damage to the property of the employee/official, the State, and third parties.
- d) Agencies are responsible for establishing written policies and procedures to ensure all vehicle use is in accordance with this Section. In the event of a violation of this Section, the user's agency head:
- 1) is responsible for instituting corrective action, which may include discipline up to and including discharge; and
 - 2) shall require and verify the user has paid the State for each mile or fractional mile of unauthorized use. Payment to the State shall be equal to the amount reimbursed to State employees for the use of personal vehicles (see 80 Ill. Adm. Code 3000.300(f)(2)).
- e) Agencies may establish policies consistent with or more restrictive than the rules set forth in this Section.

Employees who are required to travel on official state business by driving an automobile must possess a valid driver's license and the minimum levels of insurance coverage established by the Illinois General Assembly and referenced in the Travel Guide. Failure to do so may result in disciplinary action.

PTAB maintains a small fleet of vehicles at both our Des Plaines and Springfield locations. State vehicles are to be used for official business only, and are not assigned to any particular person on an on-going basis. If you will need to use an automobile to carry out your responsibilities, it will be necessary for you to contact the vehicle coordinator so that your name may be added to those authorized to make credit card purchases for such routine automotive related items such as gas, to obtain the keys and Mileage and Vehicle Cost Report log for the assigned vehicle, to obtain both the credit card for automotive related routine items and the CMS credit card with instructions to follow in the event of an accident, and to identify the length of time the vehicle will be needed. Persons authorized to use state vehicles are responsible for their safe operation, and must comply with all traffic laws. A Vehicle Operator's Manual should be present in the state vehicle's glove box at the time it is released to the employee.

Drivers of vehicles owned or leased by the State are covered by the State of Illinois self-insured motor vehicle liability plan. If an accident occurs involving an employee's own vehicle while it is being used for state business, the individual's insurance policy is the primary coverage source. Liability amounts in excess of this primary coverage will be subject to the insurance coverage of the State.

Approved 
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The employee should fill the state vehicle with gas upon the completion of the trip and return it to its assigned parking space as soon as practicable to enable its use by other employees and promptly return the Mileage and Vehicle Cost Report log with all related items (receipts, vehicle keys, credit cards) to the vehicle coordinator. The mileage report should be completed by showing starting and ending mileage and stapling credit card receipts for such items as gas or oil to the back of the mileage log page. Any items seeming to need repair or attention should be reported to the vehicle coordinator, who is responsible for coordinating maintenance with CMS.

The vehicle coordinator is responsible for the addition or deletion of employee names from the list of those authorized to use the credit card and for issuing the related PIN (personal identification number) which enables its use. Monthly, the Springfield vehicle coordinator will receive a detailed, statewide report from the charge card issuer identifying such things as who drove the car, miles driven, average mileage per gallon, where purchases were made and the amount of such purchases, etc. which will be reviewed for reasonableness and payment authorization.


State vehicles must be returned to the Des Plaines office or the Springfield Office upon completion of state related business. As an exception to this, an employee may continue in their use of the state vehicle on their business related trip to place of personal residence or other such place of overnight occupancy if return to place of employment would exceed the employee's normal end of shift. In the event the state vehicle is used to travel to place of residence or other place of overnight occupancy upon completion of state related business, the employee shall include with their travel expense voucher, Form C-10, a written statement indicating the location of state business, the nature of the business, and what time the state related business concluded. Employees seeking reimbursement for travel expenses are required to complete a state travel voucher, Form C-10, and attach appropriate receipts for any transportation, lodging, or miscellaneous expense that individually exceeds \$10. In the event the employee has been unable to obtain such a receipt, a typed statement signed by the traveler that certifies the amount paid for the particular expense should be furnished.

If you will be traveling and need clarification of PTAB's travel and vehicle policies, we encourage you to confer with our agency's Travel or Vehicle Coordinator.

Section 7.2 (c) Care of Official Documents, Money and Property

The care of official documents is regulated by state law, and it is critical that all taxpayers and others doing business with PTAB be able to rely upon the truthfulness and accuracy of records secured and maintained by the agency. Moreover, if an employee submits or prepares any document or record which contains false information, it may jeopardize the value of an evidentiary review, affect the outcome of a case, and/or present an actual or potential risk of harm to those who are or would be parties to the appeal.

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