

**Travel Policy**  
**Approved July 15, 2015**



**Policy Purpose**

This policy addresses the reimbursement of Chapter authorized travel for reasonable and necessary travel expenses incurred by Chapter volunteers and conference speakers in the conduct of business for the Oregon Chapter of HFMA. Panel speakers are excluded from this policy and any reimbursements related to panel speakers are an exception and must be approved by the board prior to the expense being incurred. (Refer also to the Authorization of Transaction policy.)

**Procedures**

**Transportation:**

**Mileage Reimbursement**

- Use of a personal car is reimbursable at the current IRS allowable rate per mile. Tolls and parking fees are also reimbursable. When travel by a personal car is used as an alternative to air travel, the mileage allowance and other expenses related to this mode of transportation will be reimbursed only up to the cost of the applicable coach class air fare or actual cost, whichever is lower. This maximum reimbursement rule applies also to rental cars or private aircraft.
- Documentation for the number of miles should be provided at the time of the reimbursement request. I.e. – Google maps, etc

**Air Transportation**

- Class of Service: All volunteers and speakers are expected to travel coach class.
- Lowest Logical Airfare: All airline tickets should be booked and expensed at the lowest available airfare at the time of booking. Effort should be made to book far enough in advance to take advantage of “early purchase” discounts.
- One bag fee will be reimbursed per approved traveler.
- Airport parking for a personal auto used to travel to the airport will also be reimbursed. The traveler should choose the most economical parking rate available at the airport.
- Travel Protection Insurance will not be reimbursed by the Chapter.
- Detailed receipts are required at the time of the reimbursement request.

**Ground Transportation**

- Reimbursement is made for the most appropriate means of ground transportation (taxi, shuttle, personal auto) from/to the traveler's point of origin and the airport; from/to the airport and the destination.
- When other transportation options are not available, or not cost effective, reimbursement will be made for the use of a rental car. Car rentals will be at the lowest possible rate per day. All rentals should be for mid-size cars or smaller. The option for Collision/Loss Damage Care Rental Insurance offered at the time of rental should only be exercised if the volunteer's or speaker's personal automobile insurance does not cover rental insurance.
- When returning rented vehicles, (1) refuel the gas tank to avoid costly gasoline charges, (2) return the car to the original rental location to avoid drop-off charges, and (3) verify that the rate charged is correct.
- When deciding between a rental car and a shuttle to the conference facility, please look for the lowest possible expense and go with this option.
- Detailed receipts are required at the time of the reimbursement request.

**Lodging:**

- Standard rooms at reasonably priced hotels are reimbursable for one night only for the Chapter business purpose. If the business meeting is at a resort, resort fees included with the room charge are also reimbursable. Hotel parking fees for a personal auto used to travel to the meeting/conference will be reimbursed.
- Detailed receipts are required at the time of the reimbursement request.
- Travel Protection Insurance will not be reimbursed by the Chapter.
- Lodging will be booked by either the volunteer or the speaker directly.

**Meals:**

- Volunteers or speakers traveling on chapter business are reimbursed for meal expenses that are reasonable, appropriate, and supported by a receipt. Reimbursement for meals includes beverages (*excluding alcoholic beverages unless part of a Chapter group dinner*) and tips; however, meals purchased elsewhere when the Association schedules group meal functions as a part of the official meeting are not reimbursable. An exception is made for breakfast when only a Continental Breakfast is part of the meeting agenda.
- Meal reimbursement is limited to \$60 per day or actual costs, whichever is less, unless the expense is for an event sponsored by the Chapter.
- Detailed receipts are required at the time of the reimbursement request.

## Oregon Chapter HFMA – Travel Policy

### Speaker Fees:

- Oregon HFMA does not typically pay for speaker fees.
- Program Chair and Program Co-chair must obtain pre-approval from *BOTH* the president and president-elect (refer to the Authorization and Transaction Policy)

### Other Reimbursable Expenses:

- Reimbursement to cover reasonable telephone calls, wi-fi access, hotel tips, and incidentals normally expected to be incurred during the meeting/conference, will be reimbursed at a per diem of \$15 per day or actual expenses, whichever is less.
- Detailed receipts are required at the time of the reimbursement request.

### Non-Reimbursable Expenses

- *Alcoholic beverages unless part of a Chapter group dinner*
- Baby-sitter costs
- Airline club dues
- Barber/Hairstylist
- Traffic fines
- In-flight movies
- Hotel room movies
- Luggage/briefcases
- Late fees for registration
- Travel insurance
- Expenses incurred by personal guests of the traveler. In all but exceptional cases, costs related to the spouse of a traveler are personal.
- Cost of beverages, except associated with meals, is also considered personal expense and as such, is not reimbursable.

### Reimbursement of Travel Expenses

- For reimbursement, the Oregon HFMA **Member Expense Reimbursement Form** should be used to document expenses. A separate Report should be completed for each individual trip. Expense Reimbursement Reports should be submitted to the Chapter Treasurer.
- An electronic version of the Member Expense Reimbursement Form is located at [www.oregonhfma.org](http://www.oregonhfma.org) **Travel expenses should be submitted for reimbursement within two weeks after the travel is completed.**
- Pre-payment by the traveler of certain travel expenses, such as airfare paid in advance, may be reimbursed when incurred. The request should be in the same format as described above.
- All expenses should be documented with a receipt. If a receipt is unavailable, an explanation should be attached to the report explaining the omission.

**Expense Reimbursement Submission Timeline**

- **Member Expense Reimbursement Forms** submitted 30 days after expenses are incurred are considered delinquent. Oregon HFMA Officer’s approval is needed to pay delinquent submissions on an exception basis. Justification for delinquent submission is required on the expense reimbursement form.

**Approved National Travel Expenses**

Event	Approved Attendees
<b>Leadership Training Conference</b>	Following year President, President Elect, Secretary, Treasurer (every other year), Program Co-Chairs, other at large selection by President. Seven members receive free registration from HFMA.
<b>Annual National Institute (ANI)</b>	Immediate Past President, President, President Elect
<b>Fall Presidents’ Meeting</b>	President, President Elect
<b>Region 11 Symposium</b>	President, President Elect
<b>President’s Award</b>	President may approve up to two winners of the annual President’s award who shall receive approval to travel to either ANI or Region 11 Symposium at the expense of the chapter.

Note: The Treasurer will be approved for one National Conference (ANI or the Region 11 Symposium) during its second year in the position.