



## **Policy Statement**

This policy is intended to:

- provide a clear and consistent understanding of Montana Chapter Healthcare Financial Management Association Board (Chapter) Member's travel expense reimbursement policy;
- explain requirements that promote the reasonableness of costs incurred by the Chapter Member's travel expense.

The Chapter Members appreciate the efforts of those who travel for the Chapter's business to keep costs within reasonable limits and to follow consistent policy and procedures with respect to the reimbursement of these expenses. The provisions of this policy must be applied consistently to all travel expenses incurred by individuals.

## **Responsibilities**

### **Traveler**

Travelers should spend Chapter's funds prudently. Business travel expenses will be paid by the chapter only if they are reasonable, necessary and in accordance with this policy. Individuals who incur business travel expenses should neither gain nor lose personal funds as a result of their travel.

The traveler is responsible for submitting all forms related to his/her travel. It is encouraged within 30 days of returning. Receipts will be required for actual daily meal expenses, with a guideline not to exceed \$50.00, airline tickets and lodging expenses. Depending upon the travel destination, exceptions for meals higher than \$50.00 may be approved by the Board.

## **Expense Advances**

The Traveler is encouraged to pay for their travel expenses and then request reimbursement. However, there may be times when a cash advance for travel is required. Advances will be reviewed and authorized by the President. The advance will be deducted from the traveler's next submitted expense report. Receipts will be required to offset the advance.

## **Authorized Approval**

All travel must be approved by the Chapter Board – verifying the following:

- Business purpose of the travel is valid and directly related to Chapter business.
  - Total cost of the trip is within the approved budget, exceptions may be approved by the Board.
- Regularly scheduled travel does not require additional approval.

## **Air Travel**

Travelers must purchase the lowest-priced tickets available. Exceptions may be allowed if the lowest-priced fare would:

- require travel during unreasonable hours;
- excessively prolong travel;
- greatly increase the duration of the flight;
- result in increased costs that would offset transportation savings;

Justification for any of these exceptions must be approved in advance by the Chapter President or the Secretary Treasurer. Travelers should make reservations as soon as travel plans are finalized to obtain advance purchase discounts. When convenient, travelers should consider staying over a Saturday night, which could result in airfare savings.

## **Lodging**

The Chapter will reimburse a traveler for allowable lodging expenses incurred during related travel.

Receipts for lodging expense are always required.

### **Lodging Receipts**

A lodging receipt must include all of the following information:

1. The name and location of the lodging establishment.
2. The dates of stay.
3. Separate amounts for charges such as lodging, meal and telephone calls.

### **Room Charges**

The Chapter will reimburse travelers for the single occupancy cost of a standard room. When traveling to a conference, it is appropriate to stay at the hotel hosting the conference.

### **Deposits and Cancellations**

The traveler will not be reimbursed for the deposit or guarantee penalty if he/she fails to make a cancellation notification unless there are extreme extenuating circumstances beyond the control of the traveler (for example, a canceled flight). Such circumstances must be documented on the expense report.

### **Rental Cars**

The Traveler will be reimbursed for the cost of renting a compact or standard-size car and for the automobile-related expenses if use of the rental vehicle is the most economical mode of transportation.

Upgrades to full-size cars can be approved by the Chapter President if a detailed explanation (for example, number of persons, luggage accommodations, length of commute between airport and destination) accompanies the receipt. Before renting a car, the traveler should consider shuttle services and taxis, particularly for transportation between airport and lodging. Mileage is not reimbursable for rental cars. In these cases, the direct cost of gasoline may be reimbursed.

## **Private Automobiles**

The Chapter will pay a standard rate per mile for official Chapter travel by private automobile based on the actual driving distance by the most direct route. The standard mileage allowance, defined by the IRS is in lieu of all actual automobile expenses such as fuel and lubrication, towing charges, physical damage to the vehicle, repairs, replacements, tires, depreciation, insurance, etc.

Traffic ticket and parking ticket expenses will not be reimbursed.