


AIHA Travel Reimbursement Policy for Volunteers on AIHA Business (Approved October 2016)

The goals of this policy are to ensure:

- Travel for AIHA is efficient and effortless as possible.
- Travelers are reimbursed in an accurate and prompt manner.

AIHA appreciates it when employers fund volunteer travel. Volunteers are encouraged to request funding from their employer. If employer funding is not available, AIHA volunteers may seek reimbursement from AIHA for approved travel to participate in AIHA events. AIHA events include committee, board, task force or other group functions, or meetings with other organizations as an AIHA representative. Guidelines for approved travel are presented in this document. The purpose of these guidelines is to provide AIHA volunteers convenience while ensuring AIHA's fiscal responsibility. This policy should ensure volunteers do not experience either financial hardship or financial gain due to expenses incurred while performing volunteer duties.

The following guidelines explain common events/activities that volunteers are reimbursed for expenses. However, volunteers should always confirm with appropriate AIHA staff that they are eligible for reimbursement of expenses. For situations not covered by these guidelines, please contact AIHA staff.

Association Sponsored Meetings

AIHce related travel and meetings: Staff will determine approved travel expenses for meetings held at AIHce.

- AIHA will **only** cover costs when travel is beyond the normal AIHce conference timeline (i.e., meeting is held before or after AIHce).
- AIHA may provide food and/or beverages during official volunteer AIHce meetings. For planning purposes, if it can be justified that other persons (i.e. corresponding members, guests, etc.) need to attend the meeting, then the meal menu may be adjusted to accommodate additional persons. AIHA staff must be contacted to approve and adjust meal plans.
- AIHA will **NOT** provide alcoholic beverages. (NOTE: Alcoholic beverages may be provided at AIHA sponsored dinners and receptions if approved through the budget process. Contact AIHA staff for confirmation).
- AIHA will **NOT** reimburse social gatherings, informal lunches, dinners, etc. not

related to AIHA business.

Leadership Workshop: The following travel expenses will be covered by AIHA:

- Hotel lodging for invited attendees to the workshop.
- Airfare for one representative from each volunteer group (VG).
- Airfare for one representative from each student local section and the Student Local Section Council (SLSC) chair.
- Airfare for each Local Section Regional Representative (LSRR) and Local Section Council (LSC) chair.
- Other necessary travel expenses (i.e. parking, ground transportation) related to attendance.

NOTE: These travel expenses are budgeted within the AIHA budget. VGs do not need to request funding on their annual budget.

General and Project Team Meetings

Virtual Meetings: All AIHA volunteer groups are encouraged to hold virtual meetings (conference calls, e-meetings, online collaboration) with the exception of AIHce meetings. AIHA staff will coordinate and arrange virtual meetings.

Face-to-Face Meetings: If face-to-face meetings are necessary, requests with clear justification for a face-to-face meeting must be submitted and approved through the AIHA annual budget process. If a face-to-face meeting becomes necessary after the AIHA budget has been approved, the request with clear justification must be submitted and approved by AIHA staff, the board coordinator **and** AIHA Finance Director. AIHA staff can assist VG leaders with the justification that includes appropriate costs (meeting space rental, audiovisual, lodging, airfare, meals, etc.). If AIHA staff, guests, outside consultants, experts will be attending the meeting, their travel costs must be included in the justification and cost computation.

Approved face-to-face meetings must take place at AIHA headquarters, unless it can be shown it is more cost effective to hold the meeting elsewhere. It may be beneficial to meet in conjunction with other meetings or conferences that are being attended by the majority of the volunteers. If this is the case, AIHA will not reimburse airfare, lodging, etc. that the volunteer would have provided to attend the meeting or conference. It is AIHA policy that an AIHA staff person must be present at all volunteer group meetings, either in person or via teleconference.





Other Volunteer Travel: Other volunteer-related travel may be funded if it is justified and approved by AIHA staff, the board coordinator **and** AIHA Finance Director.

FOR ALL AIHA-SPONSORED MEETINGS, AIHA STAFF WILL COORDINATE MEETING LOGISTICS (INCLUDING MEETING LOCATION SELECTION).

No volunteer is authorized to commit AIHA to any lodging, meeting space, or food service arrangement. The VG chair should contact AIHA staff no less than eight weeks, but preferably 12 weeks, prior to the meeting date to make the necessary arrangements.

Reimbursement Guidelines

AIHA reimburses volunteers traveling on behalf of AIHA based on Internal Revenue Service (IRS) regulations. IRS regulations require a traveler to record as taxable income dollar amounts received above certain levels, or not supported by appropriate receipts. AIHA's goal is to reimburse volunteers without creating any taxable income by reimbursing actual expenses.

The Travel Expense Reimbursement Request form is available at www.aiha.org (type "Expense Report" in search bar to access the latest form). AIHA staff can provide additional guidance in advance of the meeting, so the volunteer can arrange travel plans well in advance. Volunteers should review these and all related guidelines prior to initiating meeting planning. **Reimbursement requests must be submitted within 45 days of the date of travel. If the AIHA expense report is not submitted within 45 days, the reimbursement request may be denied.** Consult AIHA staff with questions so as not to delay reimbursement requests.

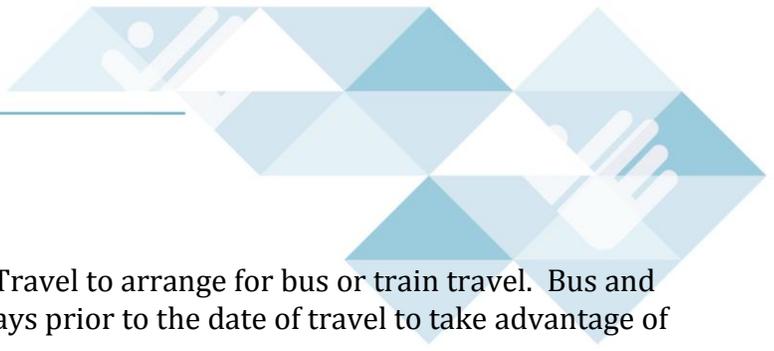
All volunteers traveling on behalf of AIHA **MUST** use AIHA's travel partner, **Maupin Travel**, to secure travel arrangements. Although individual ticket prices may appear higher than those on alternative travel websites, Maupin Travel is able to monitor volunteer travel costs, an opportunity to control ticket prices for volunteers who have special travel needs, and an opportunity for AIHA to earn free tickets to offset higher fares to long distance locations. Maupin Travel representatives can attain the best travel arrangements, while following the parameters established as part of AIHA travel guidelines. It is their responsibility to secure the most cost efficient travel itinerary. If the volunteer's travel plans are outside of AIHA parameters, the Maupin Travel representative will contact AIHA staff. AIHA staff will seek approval from the AIHA Finance Director. The volunteer will be informed by Maupin Travel of the approved travel plan (original or adjusted to achieve AIHA travel policy).

Volunteers can reach Maupin Travel at (919) 821-2146. AIHA staff notifies Maupin Travel with the meeting date and location along with the names of attendees. Volunteers should identify themselves and the meeting they will be attending to the Maupin Travel representative, so they can proceed with the travel arrangements.

Air Travel:

- a. AIHA travelers must make their arrangements, when possible, a minimum of 28 days prior to the date of travel. Reimbursement for flights booked less than 28 days prior to date of travel may be limited to cost of 28-day-prior fare if the cost is significantly higher than the cost if booked 28 days prior. Booking flights 28 days prior or earlier allows taking advantage of advance purchase and capacity-controlled fares, which are usually lower in price.
- b. An alternative travel booking service may be used for special travel needs (volunteer's employer is reimbursing a portion of travel costs, or volunteer is traveling with a family member), as long as the use of this service does not exceed the airfare provided through Maupin Travel. The volunteer must provide documentation that the alternate airfare is less expensive than the airfare provided through Maupin Travel and receive prior approval from the AIHA staff **and** AIHA Finance Director to use the alternate travel booking service.
- c. AIHA travelers may request the option of using business class travel on international flights when attending events as an AIHA representative, if the flying time is over eight (8) consecutive hours for a single segment, or over twelve hours flying time with a layover. Travelers must receive approval from AIHA staff **and** AIHA Finance Director prior to booking a flight. AIHA may request the traveler use frequent flier miles or miles plus a fee upgrade for the ticket. AIHA will reimburse the fee upgrade.
- d. Maupin Travel **only** purchases penalty and non-refundable fares. If a traveler wishes to purchase a refundable fare, it must be approved by AIHA staff **and** AIHA Finance Director.
- e. AIHA travelers may request direct flights unless the cost savings for a connecting flight is \$250 or more.
- f. AIHA travelers are encouraged to consider an overnight Saturday stay, if it results in an overall savings (combined airfare & hotel fees).
- g. AIHA travelers choose to stay an extra day to take advantage of reduced airfares, AIHA will reimburse the volunteer the extra cost of room and food as long as it is less than the airfare savings. (Expense savings should be clearly documented on the expense report.)
- h. AIHA travelers are encouraged to take advantage of carry-on luggage to avoid checked baggage fees. AIHA will **only** cover the cost of the **first** checked bag.
- i. AIHA **will not** cover the additional cost for **preferred seat selection** (aisle or window). Any additional fees for seat selection are the responsibility of the AIHA traveler.





Bus/Train Travel:

- a. AIHA travelers **MUST** use Maupin Travel to arrange for bus or train travel. Bus and train travel must be arranged 28 days prior to the date of travel to take advantage of cost saver fares.
- b. AIHA will reimburse the bus or train travel fares up to the cost of the airfare.

Car Travel:

- a. AIHA travelers wishing to travel by personal car will be reimbursed for all expenses (tolls, parking, mileage at the current IRS reimbursement rate) UP TO the total cost for air travel to the same location (including airline fare, airport parking, and transportation to/from the hotel). The AIHA traveler must provide documentation to demonstrate the difference between the air travel and personal car travel.
- b. AIHA will only approve car rentals when transportation is needed to get to and from AIHA events that are more than 30 miles from hotel, airport or train station; or the cost of the car rental plus parking is lower than the cost of taxi or shuttle services. Otherwise, taxi or hotel shuttle services must be used by the AIHA traveler.
- c. AIHA travelers must use Maupin Travel to arrange for car rentals, since they can usually provide lower negotiated rates. If a car rental rate provided by another car rental company is \$15/day cheaper than the Maupin Travel rate, AIHA travelers are encouraged to use the other car rental company.
- d. AIHA travelers are approved to rent intermediate-sized cars. This class of service allows reasonable comfort at the most practical cost and best safety rating.
- e. AIHA travelers must re-fill the car rental gas tank whenever possible in order to avoid costly re-fueling expenses charged by the car rental company. AIHA will reimburse travelers for the cost of fuel.
- f. AIHA travelers are requested to rent and return rental cars to the same location in order to reduce rental costs.
- g. If your personal or business insurance or credit card does not/will not provides insurance for rental cars, AIHA will cover the cost of rental car insurance for Collision Damage Waiver and Loss Damage Waiver. (Please check with personal insurance representative or credit card company prior to travel).
- h. AIHA travelers are responsible for any traffic, toll or parking violations.

Transportation between Airport and Hotel/Meeting:

AIHA travelers must use the hotel shuttle to/from the airport and to/from the hotel. (Many hotels offer this as a complimentary service). If hotel shuttles are not available, AIHA travelers should use cost-effective airport shuttles or local public transportation (e.g., taxi, light rail, subway, trolley or bus). AIHA travelers are encouraged to “ride share” in taxis with other AIHA volunteers. Reasonable tips (up to 20%) may be added to these fares. AIHA travelers must submit receipts for these fares for reimbursement. Please provide names of all travelers sharing transportation on the receipts and the Travel Expense Reimbursement form.

Hotel Charges:

Hotel room fees and taxes will be paid directly by AIHA, unless indicated differently by AIHA staff. AIHA travelers are responsible for incidental expenses, and where appropriate, submitted for reimbursement. Reasonable tips for baggage handling (\$2 per bag) and housekeeping staff (\$2-\$5) depend on service and hotel) may also be submitted for reimbursement. In-room movies or courtesy bar expenses will **not** be reimbursed by AIHA. If you have any questions, please contact AIHA staff. The hotel bill must be included with the travel expense reimbursement form.

Meal Reimbursement (this is not a per diem):

AIHA will provide meals or reimburse AIHA travelers for meals when traveling in an official capacity for AIHA. AIHA travelers must submit receipts with the expense reimbursement form. Reimbursement for meals is for a maximum of \$65 per day, **less reduction for meals provided by AIHA**, as follows:

Breakfast provided.....	\$10.00 per day
Lunch provided.....	\$20.00 per day
Dinner provided.....	\$35.00 per day

AIHA travelers may purchase alcoholic beverages, but these beverages will be included as part of the total daily meal reimbursement as described in the above guidelines.

If an AIHA traveler will not be attending a meal provided by AIHA, please advise AIHA staff so the meal order may be adjusted to avoid unnecessary charges.

NOTE: Per day meal reimbursement rates may be adjusted for travel to more expensive cities, in which case AIHA staff will notify AIHA travelers in advance of the meeting.

Travel Expense Reimbursement Request Form

The Travel Expense Reimbursement Request form is available at www.aiha.org (type “Expense Report” in search bar to access the latest form). This form along with all receipts must be submitted electronically to AIHA staff. Please save the form and the corresponding receipts as a single PDF file. It is also helpful to arrange the receipts in chronological order for easier review by AIHA staff. AIHA staff will forward to AIHA Finance Director for final





review and processing by the accounting department.

AIHA staff will process travel expense reimbursement request forms within five business days of their arrival in the accounting department. Lack of appropriate supporting documentation (receipts) may delay the processing of the request. The form is also used to charge expenses to programs/activities and track spending against approved budgets.

REMINDER: Reimbursement requests must be submitted within 45 days of the date of travel. If not submitted within 45 days, the reimbursement request may be denied.

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- *Approved October 2016 by the AIHA Board of Directors*

