



## **Travel Policy**

*Effective September 26, 2011*

The Public Health Accreditation Board values participation of volunteers in its activities, such as serving on the Board, committees and in visiting health departments for the purpose of determining conformity with PHAB's standards. Such activities will often involve travel and the use of personal and professional time for the betterment of the organization. PHAB appreciates these contributions and the sacrifices that are frequently involved. Public health accreditation will be successful due to the engagement of its volunteers. This policy is designed to provide PHAB's volunteers with guidance in making their travel arrangements as well as securing reimbursement for same. It is PHAB's intention that its volunteers encounter as little difficulty as possible in making travel arrangements and in securing timely reimbursement.

It is the policy of PHAB that volunteers be reimbursed for their reasonable and authorized expenses incurred while conducting PHAB business. It is expected that volunteers be asked to travel only at reasonable times and stay at comfortable accommodations during their travels. The board authorizes the President to develop travel guidelines and policies for its volunteers that are consistent with this intent and that function prudently within the organization's available resources. In general, all travel to be reimbursed by PHAB must have prior approval and must follow the travel procedures for the respective activity (board meeting, think tank, committee meeting, site visit, etc.). PHAB will provide travelers with specific travel logistics for the event as soon as the event is planned.

Where travel reimbursement is provided by a grant or other third party funding source, PHAB will comply with the requirements of that funding source.

Travel policies will be reviewed annually by the Finance Committee.

## Travel Reimbursement Procedures

As stated in PHAB's Travel Policy, the following procedures and amounts authorized for reimbursement are intended to be general guidance. If travel arrangements cannot or do not comply with the travel reimbursement allotments outlined below, then prior authorization from the Chief Administrative Officer (copy of email from mpaepcke@phaboard.org) or a written justification for additional reimbursement must accompany the travel reimbursement form. **PHAB reserves the right to make individual reimbursement decisions based on the operating budget.**

### ***Transportation***

1. Once you have been approved for travel, you will be sent contact information for PHAB's travel agency. Air travel must be completed using the least expensive fare available. Every attempt should be made to book travel at least 14 days in advance. You must obtain written approval (email is acceptable) from PHAB to purchase your ticket if not using PHAB's designated travel agency. PHAB cannot reimburse travelers for seat upgrading, business, or first-class airfare, and unapproved tickets. PHAB cannot provide reimbursement for travel expenses incurred for spouse travel.
2. Travel by railway can be used, using the most direct route, and should not exceed the least expensive air travel via the most direct economy air route.
3. Automobile mileage will be reimbursed at the current federal government rate per mile, not to exceed the cost by the most direct economy air route. The cost for the most direct (no more than one stops and/or flight change) economy air route includes any fees charged by airlines and the cost of ground transportation to and from the airport. Travelers should provide the actual mileage driven on the expense form and document departure and arrival locations.
4. Other ground transportation expenses *greater than \$10*, such as parking, taxi, bus, shuttles, etc. whether incurred at point of departure or upon return, will be reimbursed providing original receipts as submitted. A maximum amount of \$60 per business trip will be approved. If ground transportation will require reimbursement greater than \$60, prior approval is required. When PHAB provides transportation, volunteers are encouraged to coordinate ground transportation with PHAB.
5. The cost of checking the first piece of luggage will be reimbursed, but the traveler is responsible for the costs associated additional checked bags.
6. Parking will be reimbursed for overnight travel unless provided by PHAB through a master account or other arrangement. The traveler assumes the responsibility for all parking and traffic fines.

### **Lodging**

Reimbursement will be based on the actual amount paid for lodging. It is expected that the cost will be as close as possible to the federal daily maximum for that geographic area. Items such as personal telephone calls, non-meal room service items (e.g., movies, bar) and spa services are considered to be personal expenses and will not be reimbursed. If hotel reservations need to be cancelled, it is the traveler's responsibility to notify the hotel directly to avoid "no show" charges.

Occasionally, travelers may have access to government rates that are not generally available to PHAB. In these instances, the traveler can arrange their own lodging and submit the receipt for reimbursement.

### **Rental Car**

Car rental will not be allowed without prior approval by PHAB. PHAB will not reimburse for extra insurance purchased if the traveler's automobile insurance covers rental vehicles driven during business use.

PHAB has partnered with National Car Rental and Enterprise Rent-a-Car as preferred suppliers for car rentals.

In order to increase the travelers' safety and eliminate unnecessary risks behind the wheel, staff and volunteers traveling for PHAB business should not use any devices that may cause distraction from driving while operating rental vehicles (i.e., texting, use of cell phones, etc.). PHAB will not be liable for any action that caused by distracted and reckless driving behaviors.

### **Meals and Incidental Expenses**

Meal reimbursement will be based on the fixed per diem rate of \$71. This amount is designed to cover the cost of purchasing meals while traveling and to cover small incidental expenses such as non-meal tips. The per diem rate will be reduced by the cost of any meals provided by PHAB as part of the event to which the volunteer is traveling. Meal receipts are not required. *The per diem is applicable to days of the meeting, as well as travel days to and from the meeting.*

The cost of meals per diem is based on the following breakdown:

	Breakfast	Lunch	Dinner	Incidental	Daily Total	Cities
Per Diem Rate	\$12	\$18	\$36	\$5	\$71	All Cities

### **Receipt Tracker**

<b>Expense</b>	<b>Receipt Required</b>	
	Yes	No
Major Transportation (airfare, train fare, etc.)	x	
Standard Baggage Check Fees (one bag per one way trip)	x	
Lodging	x	
Parking >\$10	x	
Ground Transportation (buses, subways, airport shuttles, taxis, tolls, mileage, etc. if one way trip is more than \$10)	x	
Meals per diem		x
Tips		x
Incidentals		x

### **Personal Travel Combined with Business Travel**

Travelers may combine personal travel with business travel, provided the personal segments of the trip are a continuation of the business travel and that there are no additional costs for PHAB. Lodging may be shared with non-business guests if there are no accommodation costs such as different room types, extra rooms, and other special amenities for personal guests.

### **Expenses Incurred due to Extenuating Circumstances**

If a traveler for PHAB encounters extenuating circumstances resulting in unanticipated expenses, justification must be provided for reimbursement consideration.

## **How to Obtain Reimbursement**

Submit your completed PHAB Travel Expense Voucher and corresponding receipts to PHAB within **15 days** after the travel has been completed. PHAB may not reimburse vouchers received beyond this timeframe.

See **Instructions** below for more information on how to complete the form.

You have two options for submitting your reimbursement. To avoid a delay in processing of your reimbursement, please choose one method or the other.

- a. Attach **ORIGINAL** receipts for lodging, air, ground and other related expenses for the reimbursement you are requesting. These receipts should be **taped to an 8½” by 11” sheet of paper (using multiple sheets if necessary)**.

Meal receipts are not required. Mail all documents to:

**PHAB Travel  
1600 Duke Street, Suite 200  
Alexandria, VA 22314**

**OR**

- b. Scan the Travel Reimbursement form and receipts for all expenses and email to: **accounting@phaboard.org**

## Instructions for Completing the Travel Expense Voucher

PHAB staff will complete the “Please return to:” and “no later than:” sections of the form prior to distributing the form to travelers.

**Traveler/Payee Information Section** - Enter the name, phone and fax numbers, email, and mailing address for the traveler. This is the address to which reimbursement checks will be sent.

**Name of Meeting** - Enter the name of the meeting attended with enough descriptive information to provide audit detail, i.e. “Standards Development Workgroup Meeting” or “PHAB Board Meeting,” not just “PHAB Meeting.” Site visitors should note the name of the accreditation site visit, i.e. “Millet County Health Department Site Visit”.

**Dates of Trip** - Enter the dates of the trip, from the beginning of the travel to the return. This is the duration of the travel being reimbursed by PHAB.

### **Description of Expenses Section**

- **Air/Rail:** Enter the amount of air or rail tickets if purchased directly by the individual traveler. These expenses must be pre-approved for reimbursement by PHAB staff prior to the trip. Include any allowable service fee charged in this section.
- **Taxi/Bus/Ground transportation:** Enter the amount of ground transportation expenses. PHAB encourages the use of shared-ride vans and shuttles to reduce travel expenses whenever possible. This includes subway fares and other public transport expenses.
- **Garage Parking/Tolls:** Enter amount of parking expenses and tolls.
- **Personal Car Mileage:** In the box marked “Personal car mileage” enter the total number of miles driven using personal vehicles. PHAB will reimburse for these miles at the current allowable rate (*Refer to the IRS website for the current mileage rate*). In the “From/To” box, indicate where the personal miles were accumulated (i.e., “Washington DC to BWI airport, BWI airport to PHAB Office” or other description of departure and arrival points). Document of actual mileage (i.e., Yahoo! or MapQuest mileage totals) is requested if the total amount is more than \$10 each way.
- **Hotel/Motel expenses:** Enter allowable hotel or motel costs, or other costs of lodging.
- **Phone/Telegrams/Fax:** Enter expenses for allowed, business-related fax and phone costs.
- **Per Diem section:** \$71 unless PHAB provides a meal. An example is, if PHAB provides breakfast and lunch, then the per diem for that day would be = \$71 - \$12 - \$18 = \$41.
- **Rental cars.** Enter rental car expenses if approved prior to the trip by PHAB staff.

- **Other expenses:** Enter the amount of other reimbursable expenses incurred and describe these expenses in the box provided on the form. If additional space is necessary, attach another sheet of paper.

**Total Expenses** - Enter the total expenses for each row and column in the appropriate spaces provided. Double check the Total Expenses prior to submission.

**Balance Due** - Enter the amount due to the traveler.

**Traveler Signature** - The traveler must sign and date the voucher to obtain reimbursement.

**Budget manager Approval** - The PHAB Chief Administrative Officer (CAO) will sign the voucher after checking for allowable expenses, checking the totals and assigning the voucher the appropriate code.

**Project Charge Instructions** - This box is for PHAB staff use only.

**Questions** - Contact Travis Parker Lee, [tlee@phaboard.org](mailto:tlee@phaboard.org), 703-778-4549, ext 102 or Mark Paepcke, [mpaepcke@phaboard.org](mailto:mpaepcke@phaboard.org), 703-778-4549, ext 104, if you have any questions about travel logistics or reimbursement.