



Policy: FIN001 Travel Reimbursement
<b>Date:</b> June 2018
<b>Status:</b> Final

**Policy Statement:** The PMI Pikes Peak Regional Chapter (PPRC) has established this policy in order to provide the Officers and Volunteers (traveler) with an understanding to the Policies and Procedures relating to reimbursable business travel performed on behalf of the chapter. The policy describes the processes and forms to be used by travelers on PPRC approved business.

As the traveler's expenses are being reimbursed by PPRC, every effort should be made to keep the costs down and within reasonable limits.

Non Reimbursable Items: PPRC will not reimburse for the following items.

1. Alcoholic beverages
2. Non-PPRC approved travelers
3. Personal souvenirs and excursions
4. Meals provided by the event
5. Upgrades (Air, rental car, hotel) not previously approved
6. Requests not using the standard expense report

**Travel Reimbursement Rate Schedule:** PPRC travel is approved by the President or VP of Finance. In the cases where individual travel is required, the travel request is submitted via e-mail to the President for approval. Actual expenses incurred within the approval limits are reimbursable.

**Travel Status:** Travelers are in travel status when they are on PPRC business and more than 35 miles from their place of residence. Travelers can be reimbursed for mileage, flight insurance, luggage, meals, tolls, and parking costs. If a traveler

**Reimbursements for Meals and Reception:** PPRC travelers meeting with persons during a meal, conference, or reception may purchase food or beverages, excluding alcohol, in consort with the activity.

Special dietary requirements: Traveler should check with the event organizers to verify if your dietary requirements are available. If not, get approval from the President prior to the event for additional meal costs.

Reimbursement for meals that are included as part of an event registration fee are not reimbursable.

Alcohol purchases are not reimbursable by PPRC.



**Air Travel:** Air travel will be scheduled only when it is clearly in the best interest of the PPRC and is more cost effective than other means of travel. Travelers will avail themselves of special cost-saving airline fares whenever possible (such as Saturday overnight stays). In all cases, the traveler will seek the lowest cost coach fares and plan trips well in advance to permit full use of lower fares. Travel must be by the most direct and cheapest route possible. Tickets for travel will be purchased at least two weeks prior to the Travel event unless approved by President. A person traveling by an indirect route not associated with the purpose of the trip will personally assume any extra costs incurred. No transportation costs will be allowed between a traveler's residence and his or her workplace.

Travelers should consider personal vehicle mileage costs associated with using alternate airports and additional lodging associated with some special rates (such as Saturday overnight stays)

Traveler must purchase flight insurance to protect PPRC in case traveler has to cancel their participation in the trip.

Traveler's will be provided a travel budget for airfare and will be required to stay within that budget when purchasing tickets. If the budget is exceeded, the traveler must get approval from the President prior to incurring the cost and / or will be responsible for the amount over the published limit.

**Travel between Residence and Airport and Hotel:** Travelers will be reimbursed for the following travel expenses incurred between residence and transportation terminals (bus stations, airports, etc.) when travelling for PPRC business needs and events.

1. Personal car mileage at the existing IRS mileage rate plus tolls and parking will be reimbursed and the traveler must provide receipts or supporting documentation to be reimbursed.
2. Actual cost incurred for shuttle, bus, car service (ex. UBER, Lyft), or taxicab. Tips will be included in the taxicab charges. A traveler should strive to use the lowest transportation possible (usually the shuttle).

**Rental Vehicles:** Rental vehicles are not encouraged. However, if a rental vehicle is needed then it must be approved in advance by the President.

Rental vehicles may be used when the trip destination is over 100 miles from the airport terminal and no prior arrangements have been made for ground transportation. The PPRC does not have a contract with any particular rental agency.

1. A compact vehicle should be rented when available.
2. No upgrades will be reimbursed unless there are specific mitigating circumstances to support the upgrade. All upgrades must have the prior approval of the President. Availability of funds will not be an adequate reason for an upgrade.



4. Receipts will be obtained by the traveler for parking, gasoline, insurance, tolls, or other expenses associated with the vehicle. The receipts will be submitted with the traveler's expense report and reimbursement will be made for appropriate items.

5. The vehicle will be provided to the traveler with a certain level of gas that will be noted at the time the traveler accepts the vehicle. It is expected that the traveler return the vehicle with minimally the same level of gasoline in the tank.

The traveler signing the vehicle rental agreement accepts responsibility for the operation of the vehicle during the rental period. The vehicle will be operated only for official PPRC business or for the necessary incidentals, such as driving to the conference or hotel, related to the purpose of the trip. Under no circumstances will the vehicle be used for personal use or for travel not associated with PPRC business.

**Personal Vehicles:** When a privately owned vehicle is used for PPRC business, the traveler will be reimbursed at the current approved IRS mileage rate. Reimbursement is allowed for all travel necessary to accomplish the purpose of the trip. When a traveler uses a personal car on PPRC business and is involved in an accident, the traveler's insurance provides the primary source of coverage. The current rate for reimbursement of personal vehicle usage is provided on the PPRC expense report.

**Lodging** Travelers will be reimbursed for hotel stays and lodging based on the approved budget. PPRC travelers attending the annual PMI North American Leadership Institute Meeting or the annual PMI Region 6 Conference are authorized to stay at the event conference center. Travelers should check the conference center for special rates that may result in lower lodging expenses.

**Incidental Travel Expenses:** Internet access and fax charges are not reimbursable by the PPRC unless it is for PPRC business. Laundry, valet service, theater, banquet tickets and entertainment are considered personal items and will not be reimbursed.

**Receipts:** Receipts for hotel, airfare, trip cancellation insurance, ground transportation, parking, luggage, and meals are mandatory for reimbursement by the PPRC per the Expense Reporting Process. Any item not shown but the traveler requests to be reimbursed for must have a receipt provided. Receipts should be itemized to show items purchased.

**Expense Reports:** Expense reports for all travel will be submitted to the VP of Finance using the standard PPRC Expense Report. Expense reports and scanned receipts should be submitted within two weeks of the completion of the travel. The current version of the expense report can be found on the PPRC dropbox site or by requesting a copy from the VP of Finance.

**Reimbursements in Advance of Travel:** In instances where advance purchases are required (early event registration, airline ticket purchases, etc), the traveler may request an early reimbursement by providing a copy of the receipt to the VP of Finance.



## **Associated Procedures:**

Title	Purpose / Description
<a href="#">PPRC Expense Report</a>	Documenting and submitting travel expenses for reimbursement

**References:** None.