



Policy Name:	Employee Travel and Expense Reimbursement					Number: FIN-080
Manual:	Corporate	Category:	Finance			
Issued By:	Chief Financial and Information Officer					
Approved By:	 Matthew Armstrong, Chief Financial and Information Officer					
Applies to:	Dept Only	<input checked="" type="checkbox"/> All Sites	CSS	GSS	FARC	McDougall
Original Date:	March 2011					
Last Reviewed or Revised Date:	November 2013, October 2015					
Retired Date:						

POLICY STATEMENT

Brockville General Hospital may require an employee to travel on business from time to time. These employees will be reimbursed for reasonable and actual expenses incurred while travelling on hospital business. The reimbursable expenses should support program objectives of the hospital.

This policy applies to all employees travelling on hospital business. Unionized employees are governed by the terms of the applicable collective agreements. Where a collective agreement is silent on some aspect of travel policy and /or expenses, this policy shall apply.

DEFINITIONS

N/A

PROCEDURE

Every employee travelling on Hospital business is responsible for:

1. Conducting oneself as a representative of the Hospital at all times
2. Choosing the most practical, economical and reasonable arrangements for travel, meals, hospitality, personal and corporate expenses.
3. Retaining all receipts. Please note that a credit card slip is not a receipt. A receipt is an invoice itemizing types of expenditures, and HST information
4. Arranging accommodations, transportation and health insurance (if travelling outside Canada) and other arrangements such as booking the seminar and obtaining approval of their Manager.
5. Submitting a Travel and Expense Claim form, with original receipts, to their immediate manager for approval in a timely manner.

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6. Ensuring expenses incurred on Hospital trips are consistent with normal business standards. Those who are in any doubt as to the appropriateness of a specific travel expense should consult with their manager for guidance.

Manager, Director, Vice-President, President, and Board Chair is responsible for:

1. Reviewing and approving all travel expenses submitted by the travelling employee
2. Providing guidance to employees regarding appropriate types and levels of expenses
3. Forwarding the approved Travel & Expense Claim to Accounts Payable for processing
4. Any questions with regards to the validity of an expense or a question regarding this policy can be addressed by the Chief Financial and Information Officer.

Expenses:

1. Must be work related.
2. Must be modest, appropriate and reasonable.
3. Must strike a balance between economy, health and safety, and efficiency of operations
4. Be submitted in a timely fashion and on the Travel and Expense Claim Form
5. Expenses that are considered of a personal nature are not eligible for reimbursement. Personal expenses include, but are not limited to:
 - Expenses resulting from unlawful acts
 - Traffic and parking violations incurred while driving on hospital business
 - Recreational purposes (e.g. video rentals, mini-bars, special facility charges, entertainment not directly related to hospital business etc.)
 - Personal items not required to conduct hospital business
 - Memberships to rewards programs or clubs (e.g. airline clubs)
 - Social events that do not constitute hospitality as described in this policy
 - Alcoholic drinks
 - Expenses included due to the presence of friends or family members, unless part of hospitality as describe above
 - Hotel expenses incurred because of failure to cancel reservations
 - Credit card fees and late payment charges
 - Additional ancillary charges such as premiums for failure to refuel fuel in a rental care

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Travel:

1. When possible, travel must be approved in advance by an employee's manager. Such pre-approval should accompany the travel claim.
2. A copy of the boarding pass or ticket for all modes of transportation must be attached to the expense report.
3. Where a number of staff are attending the same function, shared travel is required where possible.
4. The mode of transportation selected will be that which enables the employee to attend to hospital business with the least cost to the hospital, consistent with the least amount of interruption to the employee's regular business and personal schedules. Consideration should be taken as to the length of time away from the workplace. Basic economy / coach fares will be paid by the hospital. Any upgrades will be the responsibility of the staff member.
5. When personal travel is combined with business travel, the employee will be reimbursed only for the business portion of the trip at the lowest available fair. Personal travel does not include travel to or from home when travelling for business.
6. The hospital expects discretion to be applied with any expenses incurred and reserves the right to limit reimbursement to reasonable costs. Any dispute over the validity of items included on an Employee Travel and Expense form will be arbitrated by the Chief Financial and Information Officer.

Travel by Vehicle:

1. When road transportation is the most practical and economical way to travel the order of preference should be as follows:
 - Rental vehicle when a rental vehicle is more economical than use of a personal vehicle; or,
 - Personal vehicle when a personal vehicle is more economical that use of a rental vehicle
2. Where a traveler accumulates more than 1,600 km/month on a regular basis, the manager will investigate lower cost options. Where a traveler continues to use a personal vehicle, the rationale for this practice should be documented.
3. The use of toll highways, including but not limited to Highway 407 (ETR), should be restricted where possible, and the use of such routes are subject to manager approval.

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Rental Vehicles:

1. Rental of a compact or mid-size vehicle is encouraged and employees are required to use car rental companies approved by the hospital where possible to ensure the most favourable rates. Consideration may be given for a car rental upgraded based on the number of passengers, weather conditions and other safety reasons. However, all luxury and sport car rentals are expressly prohibited.
2. Collision and liability insurance offered by the car rental companies must be purchased.
3. Rental cars must be refueled before returning them to avoid extra charges.
4. Receipts for gasoline purchases, parking lot charges and applicable bridge or highway tolls must be submitted with travel and expense claims.

Personal Vehicles:

1. Personal vehicles used on hospital business must be insured at the vehicle owner's expense for personal motor vehicle liability. Coverage should be greater than or equal to \$1,000,000. Drivers must satisfy themselves whether their motor vehicle insurance coverage should include business use of their vehicles. The hospital will not reimburse costs of collision and liability coverage.
2. The hospital assumes no financial responsibility for privately owned vehicles other than paying the kilometric rate when used for hospital business. Those driving a personal vehicle on hospital business cannot make claims to the hospital for damages as a result of a collision.
3. When staff members use their own vehicle for hospital business, reimbursement will be in accordance with the approved kilometer allowance (\$0.40 per kilometer). This allowance is to cover the costs of fuel, depreciation, maintenance and insurance.
4. Kilometers driven to and from the point of destination will be reimbursed as per the following guidelines.
5. The shortest distance between the hospital and the destination or the employee's home and destination will be used to calculate the maximum number of kilometers that can be claimed.
6. A mapping tool will be used to calculate the shortest distance between any two points. If a claim is found to be in excess of 10% of the shortest distance it will be returned to the employee for correction.

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7. Unless stipulated in a union contract, if an employee is commuting to somewhere other than their normal work location and travels fewer kilometers than their normal round trip between home and work, reimbursement will not be provided.
8. Unless stipulated in a union contract, if an employee is traveling to somewhere other than their normal work location on their way to or from work, the distance normally traveled to and from work will be subtracted from the trip for the purpose of reimbursement.
9. Receipts for parking lot charges and applicable bridge or highway tolls must be submitted with the travel and expense claim.
10. Employees are not permitted to transport clients or patients using their personal vehicles.
11. Travel between sites during a regularly scheduled shift will be reimbursed with the exception of executive and management (bands 8-11) employees.

Taxis, buses or subways:

1. The use of taxis by staff should be reasonable. Examples of when a taxi may be appropriate include:
 - Situations requiring transportation between stations or airports and the hospital
 - Situations requiring transportation between stations or airports and a staff member's home
 - Transportation from the hospital to home well after normal work hours where other forms of transportation (including public transit) are unavailable or are determined to be unreasonable
 - Transportation home from a staff event or an event supporting hospital business
 - When it is at the discretion of an employee's manager

Travel by Train or Bus:

1. It is expected that employees will choose the most economical and direct form of transportation by train. Wherever possible, travel arrangements should be made in advance to ensure availability of economy class seats and the best price.
2. The original boarding pass/passes and ticket/E-ticket must be attached to the travel claim.

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Travel by Air:

1. Employees may travel by air for trips that are beyond the reasonable driving distance. Prior approval for all travel by air must be obtained and documented in writing.
2. Staff will be reimbursed for travel Economy class for all domestic and international flights
3. Staff are expected to pursue the maximum savings on air travel expenses within reasonable limits. Every effort should be made to book in advance to take advantage of discounted fares and to obtain the lowest fares compatible with the necessary travel requirements.
4. The original boarding pass/passes and ticket/E-ticket must be attached to the travel claim.

Meals:

1. Employees are reimbursed for reasonable meal expenses, subject to the approval by the employee's manager if expenditures are incurred while on hospital business away from his or her place of work.
2. Original, itemized receipts must be provided with the travel claim of actual meal expenses. Reimbursement will not exceed the amount actually spent (including taxes and gratuities) as validated by the receipt accompanying the travel claim. The maximum reimbursement per meal including taxes and gratuities (maximum of 20%) is as follows
 - Breakfast \$10.00
 - Lunch \$20.00
 - Dinner \$30.00
3. No reimbursement shall be made for meals consumed at home prior to departure or upon return home, or for meals included in the cost of transportation, accommodation, seminars, and or conferences.
4. If a meal is purchased at a local establishment it must have pre-approval for reimbursement from a member of the Senior Leadership Team.
5. When an employee is authorized to pay for the meals of others, expense reports must include a brief explanation of the event and a list of those in attendance. The highest ranking employee should pay for the meal expenditures.

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Accommodations:

1. Employees should use the most economical accommodation available (generally a standard quality hotel room) that is convenient to the event being attended. No reimbursement will be made for suites, executive floors, or concierge services.
2. Staff will be responsible for the validity of all room charges and must review the hotel bill carefully to ensure all charges are correct. A detailed copy of the hotel bill must be attached to the expense report.
3. Staff will not be reimbursed for entertainment, laundry services, pay TV or movies, alcohol or special facility charges (e.g. fitness clubs).
4. Long-distance business and personal calls will be reimbursed. One personal telephone call per day of a reasonable duration as well as telephone calls to the office and with business contacts is acceptable. Wherever possible the most cost effective method should be used (e.g. hospital-issued cell phones or calling cards) in order to minimize costs.
5. Standard tips and gratuities are reimbursable, but should be documented on the travel claim.
6. While travelling on hospital business, additional business expenses not otherwise covered will be reimbursed, such as computer access charges, photocopying, word processing services, facsimile transmission, internet connections, rental and transportation of necessary office equipment, provided the charges incurred are reasonable and related to hospital business.

Consultant Expenses:

1. Consultants are not considered employees and therefore are not covered by this policy
2. Consultants will seek reimbursement only for expenses explicitly agreed to by the consultant and the hospital and as detailed in the consultant's contract.
3. Consultants may receive hospitality or take part in hospitality events so long as it is consistent with the principles of this policy.

Provision of Hospitality:

1. Hospitality is the provision of food, beverages, accommodation, transportation or other amenities at the hospital's expense to persons who are not engaged in work for the hospital. This may include:

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- Engaging representatives from other hospitals, the government, the broader public sector, industry, public interest groups or union representatives in discussion on hospital matters.
 - Sponsoring formal conferences for representatives of health services provider organizations, or for government, business or labour groups.
 - Providing persons from national or international organizations and charitable organizations with an understating and appreciation of the hospital sector or the workings of the organization.
 - Honouring distinguished persons from the health care sector in recognition of exceptional public person
 - Conducting prestigious ceremonies that are attended by government, and or distinguished persons from the private or public sector.
 - Hospitality expenses will only be reimbursed if a reasonable ratio of staff to persons not engaged in hospital work is demonstrable.
2. Hospitality will be extended in an economical, consistent and appropriate way when it will facilitate hospital business or is considered a matter of courtesy.
 3. Functions that are exceptions to the above must have prior approval from the CEO or the CEO's delegate.
 4. Where hospitality events are extended by the hospital, and where the guests include vendors (current or prospective), managers are responsible for obtaining prior approval to ensure that the event does not give, or is perceived to give, preferential treatment to any vendor. The Broader Public Sector Accountability Act will govern this practice as well and all related procurement directives must be followed.
 5. The decision to provide alcohol as part of hospitality will be made by the CEO or the CEO's delegate and will be consistent with the principle of this policy.
 6. In circumstances where alcohol has been approved, a meal or reception must accompany the alcohol and will be limited to one drink per person.
 7. Consultants are not considered staff and therefore are not covered by this policy.

Acceptance of Hospitality:

1. Acceptance of hospitality from vendors (current or prospective) may constitute a conflict of interest, and may therefore be prohibited. Managers are responsible for ensuring that staff are aware of their conflict of interest obligations.
2. Any questions regarding the acceptance of hospitality can be answered by the Chief Financial and Information Officer

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REFERENCES

N/A

RELATED POLICIES

N/A

ASSOCIATED DOCUMENTS

[BGH Travel Expense Form](#)