WA/AK HFMA Travel/Expense Policy

The Officers and Board of Directors approve an operating budget for each fiscal year. The operating budget shall be the basis for the approval of expenses that authorizes the Treasurer to pay chapter expenses. The Travel Policy also authorizes the Treasurer to pay chapter expenses.

The planning of chapter meetings and other expenses that are outside or exceed the budget will need approval of the President, President Elect or VP of Programs to authorize the Treasurer to pay.

Expenses that have been discussed and approved at the quarterly board meetings or monthly board calls will also be considered approved expenses that authorizes the Treasurer to pay.

All Travel should be approved by the President, President Elect or VP of Programs before travel arrangements are made.

Authorized expenditures are as follows:

> We will pay mileage to / from the meeting for use of your personal auto at the current IRS rate. Should you choose to fly, then we will pay mileage to / from the airport. We will pay airfare at the coach rate. We will pay for parking at the airport.
>
> We will pay for shuttle bus or taxi from the airport to the hotel or parking at the hotel if you drove your personal auto.
>
> We will pay for your hotel room and taxes for a standard room. No room service or movie rentals.
>
> We will pay for reasonable meal costs that are not provided at the meeting. As a guideline, breakfast $15.00, lunch $20.00 and dinner $25.00. Tips will not exceed 20%.
>
> Registration fee for the meeting.

The following meetings are normally planned for during the fiscal year:

> Annual Conference for the Past President, President and President Elect and Scholarship winner.
> Fall President's meeting for President and President Elect.
> Region 11 Western Region Symposium for the CORE members (up to four).
> LTC for the Officers and up to four board members.

Coverage for Key Officer (President, President Elect) Expense Coverage.

The chapter recognizes the extensive time and leadership value that the officers put into the HFMA organization to make it thrive. The chapter supports provider represented individual(s) in their efforts to take on these roles and does not want the out of pocket expenses to be a burden to the person.

Recognizing that provider healthcare expenses are managed very tightly in most all organizations the chapter is willing to make the following allowances for key positions related to seminar attendance in addition to the current chapter policies and procedures, recognizing all parties will have a portion of the expenses incurred:

- National meetings are covered either by the chapter or the Association. This includes LTC, AC, Pres Meeting, Western Region. This includes travel, hotel, registration, and meals (within chapter policy).

- Chapter meetings -The position seeks expense coverage from their employer, and if there is no or limited employer coverage for chapter expense coverage, then position can submit for a scholarship covering registration fees.
    - If the person in the key position resides in western WA around Seattle, then for travel outside Seattle Area:
        - The chapter will cover chapter event travel out of Seattle metro area travel (outside Olympia to Everett/Bellevue) and hotel expenses that are not covered by employer. Covered travel expense includes air, taxi to/from airport, and airport parking. If a person chooses to drive versus fly, gas receipts or charges on credit card statement are covered and variable travel expenses are covered, rather than a mileage rate.
        - If the employer will cover travel rather than registration, then the chapter can cover registration.
        - PE/Pres is expected to cover mileage and meals to and from the chapter event that are not covered by the chapter conference registration.
    - If the person in the key position resides in the Seattle Area, then:
        - No hotel coverage
        - PE/Pres covers mileage and meals outside the chapter event.
        - Chapter covers parking at the chapter event.

- Paid time for travel and seminars: How an employee is paid for travel/seminar time is negotiated between the employer and employee (Paid time off, regular hours, non-paid). This is not a chapter expense under any circumstances.

- This policy is subject to change by agreement of the Chapter officers. Future key officers may allow for modification of the travel guidelines, when addressing the home location of the person being outside of the Seattle area.

These guidelines were developed and approved by the current Past President, President and President Elect, January 24, 2020 and will be used in conjunction with the current travel policy as an exception for these specific positions during the time frame considered.

These guidelines were updated in June 2021, and approved by Past President, President, and President Elect.