HFMA BUSINESS & TRAVEL EXPENDITURE POLICY - VOLUNTEERS

Volunteers are the lifeblood of HFMA. The association could not accomplish its goals without the many engaged members who give so freely of their time and talents. Since HFMA events occur in various locations across the US, it is necessary for volunteers to incur travel expenses as they fulfill their roles. Being a not-for-profit, financially oriented organization, HFMA needs to balance its fiscal responsibility to its member as well as adequately reimbursing volunteers for expenses incurred in furtherance of HFMA's mission and activities.

To that end, HFMA is committed to reimbursing volunteers for normal, reasonable and prudent travel expenses that are incurred while furthering the mission of the organization. Personal safety, convenience and good fiscal judgement are requested be taken into consideration when making travel plans.

The reimbursement of travel and business expenditures must comply with IRS rules and regulations. Accurate and timely records, including receipts are necessary for compliance. Reimbursed travel and business expenses are subject to examination by the IRS. When expenses are found to be lavish or extravagant, accounted for improperly or not otherwise conform with reimbursement policies, the IRS may choose to disallow them as business expenses and consider them as compensation.

Business Expenditures

Air Travel

HFMA will reimburse for the lowest, convenient, economy air fare (coach class) and one checked bag. The Association will provide as much notice a possible to allow volunteers to make travel arrangements and take advantage of potential discounts for early booking. Volunteers enrolled in frequent flyer programs can retain all miles/points accrued. Personal travel may be combined with business travel, however, expenses related to personal travel will not be reimbursed (including any increase in airfare) related to the personal travel. Change fees will be considered an allowable expense if travel plans are altered based on a request from HFMA. Seat upgrades will be reimbursed if no other seating options are available at the time of booking.

Ground Transportation

The preferred mode of ground transportation is that which is most economical yet convenient and safe for the traveler. Reimbursement will be made for necessary shuttle, taxi, and public transportation service, if not previously arranged for by HFMA. Use of ride sharing services (e.g. Uber, Lyft) are encouraged if available. Airport parking at the departure airport is also reimbursable when determined that is a more cost-effective alternative to other ground transportation. Volunteers traveling to the same location are encouraged to share ground transportation whenever possible.

Car Rental

Cars may be rented where other means of transportation are unavailable, more costly, or impractical. When the use of a rental car is required, the size of the rental car should be the least expensive model consistent with the number of travelers. Non-reimbursable costs include, but are not limited to, unnecessary upgrades, refueling costs, tickets and fines. Rental cars are covered under HFMA's and therefore do not require additional insurance.

Hotel

Hotel reservations should be made by the volunteer at reasonably priced hotels if arrangements are not made by HFMA. Reimbursable lodging expenses include single room, luggage storage and tips for services hfma

Meals/Food
The reasonable, actual cost of meals incurred while traveling is reimbursable, including any gratuities associated with such meals. Individuals should select restaurants that are reasonably priced for the locality, consistent with normal living standards. When meals are provided at an HFMA event, after-event meals should be considered personal preference and not submitted for reimbursement unless your role and responsibilities prohibit/limit you from eating during the event. Itemized receipts are required for all meals in addition to the customer copy of the charge slip. Gratuity guidelines of 15-20% are considered appropriate but should not exceed 20% unless unusual circumstances occur.

In certain circumstances, it may be appropriate to “treat” fellow volunteers to a meal and/or beverage. HFMA suggests that volunteers consider their fiduciary role and use good judgement in these situations. Prior approval for expense reimbursement is requested.

Local Travel/Mileage Reimbursement
Mileage reimbursement will be provided at the current IRS allowable rate, tolls and parking if a personal auto is driven, for all miles driven to attend HFMA volunteer events. If claiming mileage expense, submit a map (using Google Maps or equivalent) showing the starting and ending destination and total miles.

Other Reimbursable Expenses

Reasonable gratuities to persons performing a specific service, such as porters at hotels and airports, will be considered reimbursable expenditures. Gratuities for meals should be included with the cost of the meal.

Travel with Spouse or Significant Other
In general, if a volunteer is accompanied by a spouse/significant other, that person should make all of his/her own travel arrangements, accommodations, etc. and pay all expenses incurred directly.

Expense Reporting
To permit prompt accounting reconciliation and reimbursement, requests should be completed and submitted to the Volunteer Experience Team (chapter@hfma.org) within 30 days of the end of the event. HFMA’s Non-Staff Expense Reimbursement Form should be utilized for this documentation. All receipts must be attached to reimbursement request forms. HFMA reserves the right to deny reimbursement for any expenses submitted that are unsupported by a receipt and/or appear to be extravagant in nature.

Questions about this policy can be directed to the Volunteer Experience Team.